

# FINAL REPORT

## 2016 New Hampshire Early Care and Education Market Rate Survey

**ORIGINAL**



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## **Key Findings**

### **Goal**

The goal was to survey at least 60% of licensed NH early childhood programs. The final completion rate achieved was 64.30%. The goal of achieving a 60% response rate from each region was also reached.

### **Number of Licensed Programs**

There has been a continual, gradual decline in the number of licensed NH programs over the last 15 years. There were 34 (4%) fewer programs in December of 2015 than in the last Market Rate Survey in 2014.

### **Licensed Capacity**

Consistent with US trends, mean licensed capacity has increased, from 38.49 children in 2001 to 51 in 2015. Program size increases do not necessarily recapture children from programs that have closed. For example, when one program closes, a parent may not be able to immediately find an available slot in an affordable, nearby facility.

### **Program Types**

Center based programs continue to be the largest segment, increasing from about one-third (32%) in 2001 to 284 (51%), half of all programs in 2015. The percentage of proprietary

programs has bounced back to 60.86% in 2015 from 56% in 2014; close to 60% reported in 2001.

## **Schedule**

56.17% of licensed programs offer families options of both full-time and part-time care, an increase from 53% in 2014, and close to 58% in 2001. Such programs provide care an average of 52.56 hours per week while programs offering part-time only care (21.9%) operated an average of 20.99 hours per week.

## **Special Care**

A decreasing number of programs offer special care outside of conventional hours. Very few licensed NH programs offer care from 7-9 PM (N=9), 9-11PM (N=3), and overnight care (N=2). None provided care primarily for sick children.

## **DHHS Scholarships**

More than three of every five programs (65.34%) have an arrangement with DHHS to receive scholarships for eligible enrolled children, which hasn't changed much from 62% in 2014.

## **Rate Intervals**

More than three of every four full-time programs (78.72%) charged by the week; the most common way of charging parents in part-time programs was by the day (39.58%); and in School Age programs by the week.

## **Rates**

For full-time programs, the mean weekly rates were: 0-12 months (\$226.08, up 4.99% since 2014); 13-24 months (\$213.32, up 4.32%); 25-35 months (\$202.75, up 3.39%); 36-59 months (\$188.12, up 4.27%), and 60-71 months (\$179.03, up 3.47%). Overall, rates in the Southern and Eastern regions were highest for all age ranges.

## **Scholarship Cost Share**

More than half of responding programs (51.16%) charged the DHHS-assigned cost share to parents of children receiving a NH Child Care Scholarship, and 54.56% charged parents the difference between the maximum weekly standard rate (WSR) and the actual charge.

## **Poverty and Access**

This report reviewed projected county population changes, age differences, and income. It explored poverty and access to child care in Coos and Sullivan counties, as well as in Manchester, with maps of licensed facilities, and offered suggestions for discussion regarding programs, facilities, staff and scholarships.

## Overview

This final report provides selected findings of the current and eight previous New Hampshire Early Care and Education Market Rate Survey (MR#9) among licensed providers in the state of New Hampshire.

According to Grobe, Weber, Davis, Kreader, and Pratt (2008, p.1),

*Child care market rate studies emerged in the late 1980s as Congress adopted a market-based approach to funding child care. In 1990, the federal government began a major investment in child care with the passage of the Child Care and Development Block Grant Act (42 U.S.C 9858 et. Seq.). In 1996, Congress combined multiple funding streams into the Child Care and Development Fund (CCDF) and increased its investment in child care. Since 1998, the Department of Human Services rule for receipt of CCDF funds has included a requirement that states, territories, and tribes demonstrate access to child care for parents who receive a subsidy by referring to a market rate survey conducted no earlier than two years prior to the effective date of the current Plan.*

The MR#9 aim was to attempt to survey by mail (and telephone follow-up if necessary) licensed New Hampshire providers and to report current rates charged to consumers on a statewide basis for various types of care to specified ages of young children. This report will also include information on regional rate variations across the state.

The report provides general information on the wide range of criteria surveyed, which is designed for the general reader, but also includes more detailed information designed for the specialist. This report will be available online through the NH Child Development Bureau at the DHHS website; a copy will also be provided to Child Care Aware of NH. A public presentation

will be held to review the results with providers and other interested citizens. An Executive Summary will be posted on the Department of Health and Human Services website.

## Cautions

There are several cautions to be considered in reviewing this final report. We will briefly mention six.

1. MR#9, like MR#1-MR#8, asked providers to share data regarding their fees as currently charged (e.g. hourly, daily, weekly or other). This approach provides a more realistic picture of what currently exists in New Hampshire, and also presents a more detailed and therefore more nuanced picture of child care rates.
2. Given this, we must be cautious interpreting results from MR#9 to minimize possible misinterpretation and generalization. For example, we believe it would be inappropriate to compare programs that charge by the hour with those that charge by the day. Once one creates an *Arbitrary Conversion Factor* (for example, a daily rate is the equivalent of 6.1 hours), then the result may no longer represent what actually exists. Some programs may move from charging a part-time rate to a full-time one at 6.1 hours, others at 5.7 and still others at 7 hours. It is very tempting to make such conversions, because they appear to simplify how rates are actually charged, but doing so is far less accurate than reporting rates as charged. NH Child Care Aware

*A more vexing problem in defining the child-care market arises from how providers charge for care: whether by the hour, day, week, or month. Why should that be a problem? Well, because how they charge creates different markets. This may seem just an artifact of language, but it is not. By-the-month care and by-the-hour care*

*create price differentials that cannot validly be converted into one single rate by any a priori rational formula such as supposing a 9-hour day, 5-day week, or 23-day month. One is stuck with a choice of obtaining multiple modes of charging, reporting all rates separately by mode of charging, or else converting and combining the rate data into an estimate with an unknown but significant amount of distortion.*

3. As in previous NH child care market rate surveys, this report does not reflect the true costs of child care. The real cost of care is an essential, if difficult to quantify, piece of the complete picture of early care and education in New Hampshire.
4. This final report presents a snapshot, a brief moment in time, of the market rates on a single day, December 2<sup>nd</sup>, 2015. We believe it is a relatively accurate picture of rates for that day. However, some rates will be changed, and some facilities may have closed while others have opened since that day. Therefore, it is safest to assume that the rates on December 2<sup>nd</sup>, 2015 are most reliable for that date only.
5. Results are presented based upon responses to this year's Market Rate Survey instrument, and therefore the data analyzed and trends identified can only consider information from those programs (64.30%) that responded to the survey. This may be the primary reason that some numbers presented in this report are different than numbers reported from other sources, or from utilizing other means of collecting data.
6. This project was funded at 50% of some earlier projects, with a survey goal of 60%, rather than the earlier response goal of 90%. While every effort has been made to exceed the 60% response rate from region, variables may still be slightly skewed as a result of the characteristics of responding programs. In addition, minor changes have been made to providers listed in each licensing area and child care resource and referral regions. As a

result, care should be exercised in comparing these results to results in previous Market Rate Surveys.

## Completed Surveys

### Overview

A list of 902 licensed programs was provided by DHHS in October 2015, and a Master List was created. Surveys were mailed to every program listed on December 1<sup>st</sup>, 2015. In January of 2016 follow-up calling began. Of the 902 programs to which surveys were mailed or calls were made, 8 (0.88%) were classified as *undeliverable* and 1 was returned *unreadable*. In the remaining group of programs, completed surveys were obtained for 571. In entering data, 10 of these were confirmed as *closed just for that day* or *closed forever* and 2 were license exempt, leaving 559 surveys with data that could be coded. This resulted in a final total response rate of 64.30%.

Undeliverable	8
Return shredded	1
Closed	10
License Exempt	2
Licensed with Data	559
Total	580

### Verifications

Purpose: “*Trust, but verify*” is a form of [advice](#) given which recommends that while a source of information might be considered reliable, one should perform additional research to verify that such information is accurate, or trustworthy” (Wikipedia).

Procedure: In order to verify that information received on surveys was an accurate reflection of rates charged, the contractor requested that Child Care Aware of New Hampshire (CCAoNH)

provide independent verification for a subsample of rates from providers that returned surveys. The contractor then provided Child Care Aware of NH (CCAoNH) a MR Verification Request Review and Instructions, as well as MR Verification Form that included a random listing of 50 providers that had returned surveys. This list included the provider name, owner, license number, town, zip code, and phone number but no rate information. Child Care Aware of NH was asked to confirm full-time rates for any 31 providers appearing on the list, which came to just over 5% of survey responses. Rate information was requested for full-time care for two age groups: (a) children aged 24-36 months, and (b) children 36-59 months.

Finding: In comparing rate information obtained by Child Care Aware of NH on these two categories to rate information on the same two categories from returned Market Rate Surveys, we found the following:

- 21 providers shared identical rate information for both categories
- 1 did not provide any rate information and was excluded
- 9 had identical rate information for one of the two categories. Of these,
  - 4 had rate information in one category higher on the survey than from CCAoNH
  - 5 had rate information in one category lower on the survey than CCAoNH

Discussion: When there were rate differences, they were minor, and, except for a couple of providers (see below), Child Care Aware of NH provided rates that ranged from two to five percent either over or under MR survey recorded rates. The differences obtained could be due to any of the following factors: (a) The MR survey requested information for one specific day - December 2, 2015. Child Care Aware of New Hampshire information was “current”, meaning it could have been obtained slightly before or after the December 2 MR survey date, (b) there was

a single month difference between the age categories asked on the survey and Child Care Aware of NH's own age categories, meaning it likely that there would be some minor "rounding" up or down, (c) in a few cases, rates may have changed between the time of the MR survey and the Child Care Aware of NH verification, and/or (d) a few of the included providers shared their daily rate with Child Care Aware of NH, and their weekly rate on the MR survey. For the two providers with the highest discrepancy, we called to ask them to clarify the differences between the Child Care Aware of NH recorded rate and our MR survey rate. One reported their stated rate, as the survey requested, but provided Child Care Aware of NH their prepaid, slightly discounted rate. The second provider difference was due to the provision of optional lunches. We remain convinced that licensed New Hampshire providers are, at least based on our experience, honest and forthcoming.

## NH Programs

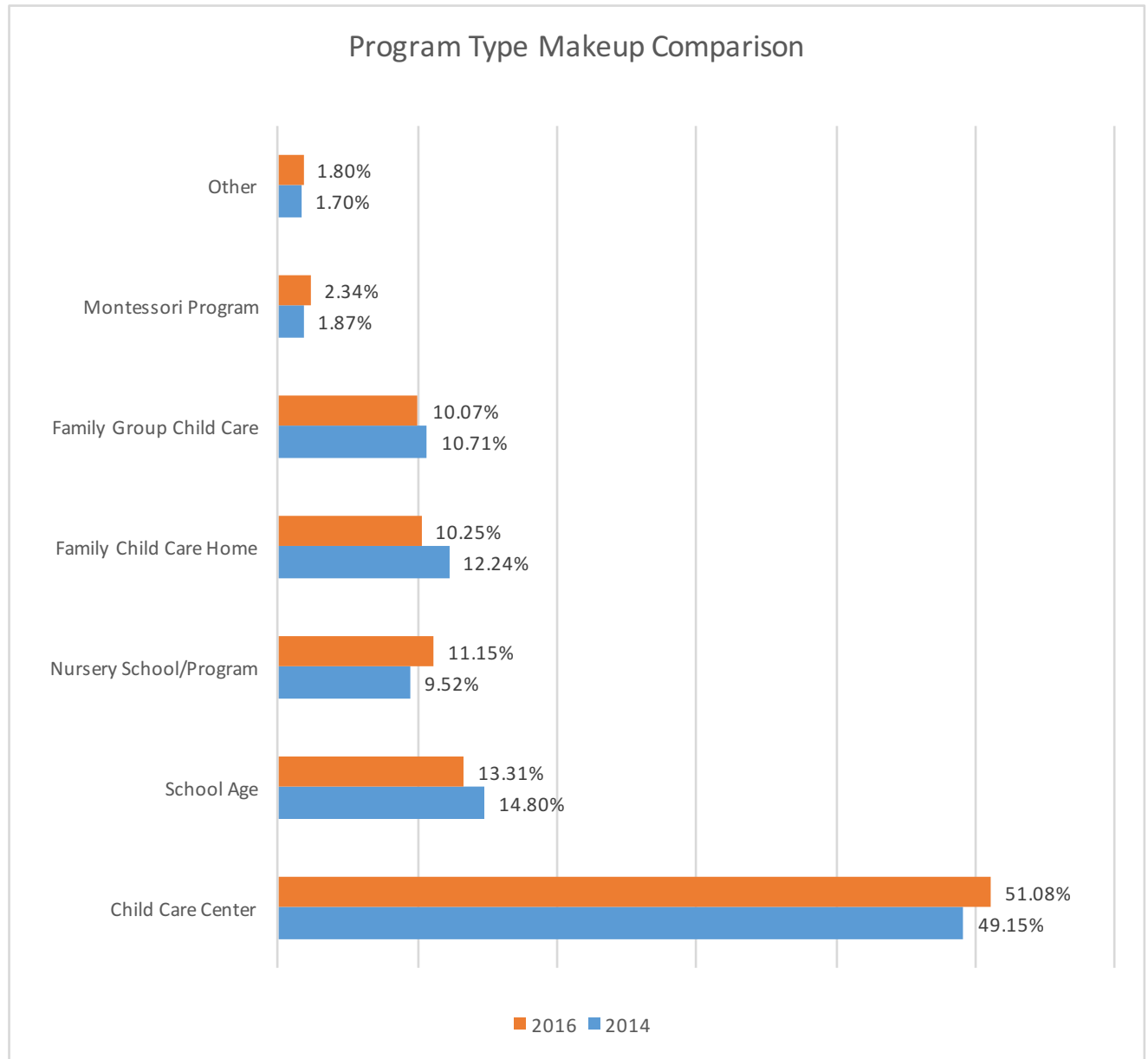
### Proprietary and Not-for-Profit Programs

About three out of five licensed programs in New Hampshire (60.86%) were *proprietary*, while the rest (39.14%) identified themselves as *not-for-profit*. The percentage of provider reported *proprietary* programs has increased slightly from 56.90% in 2014. The response rate on this question was 99.64%.

### Types of Programs

In New Hampshire, the highest percentage of licensed programs were *Child Care Centers* (51.08%), up from 49.15% in 2014, followed by *School Age (only) Programs* (13.31%), *Nursery Schools/Programs* (11.15%), *Family Child Care Home* programs (10.25%), *Family Group Child Care* programs (10.07%), *Montessori* programs (2.34%), and *Other* (1.8%). The response rate on this question is 99.46%. Since the last Market Rate Survey of 2014, *Center* and *Nursery* programs both have gained some growth while *Family Child Care Home* programs has seen a decrease.

Program Type	2014	2016
Child Care Center	49.15%	51.08%
School Age	14.80%	13.31%
Nursery School/Program	9.52%	11.15%
Family Child Care Home	12.24%	10.25%
Family Group Child Care	10.71%	10.07%
Montessori Program	1.87%	2.34%
Other	1.70%	1.80%



## Quality Indicators

Among 527 responses, 130 (24.67%) survey respondents indicated their programs were Licensed Plus while 397 (75.33%) were not. Fewer programs were NAEYC accredited – 54 (10.89%) answered yes while 442 (89.11%) no, based on 496 responders.

## **Head Start**

According to survey responders, Head Start was offered in 32 (5.72%) licensed NH programs.

This percentage has not changed much from 5.46% since 2014.

## **DHHS Reimbursements**

More than three out of five licensed programs (65.34%) have an arrangement with DHHS to receive scholarships for enrolled children, a slight rise since 2014 (62.03%).

## **Months, Days, and Hours of Operation**

Slightly more than three out of four licensed programs (76.57%) operated throughout the year.

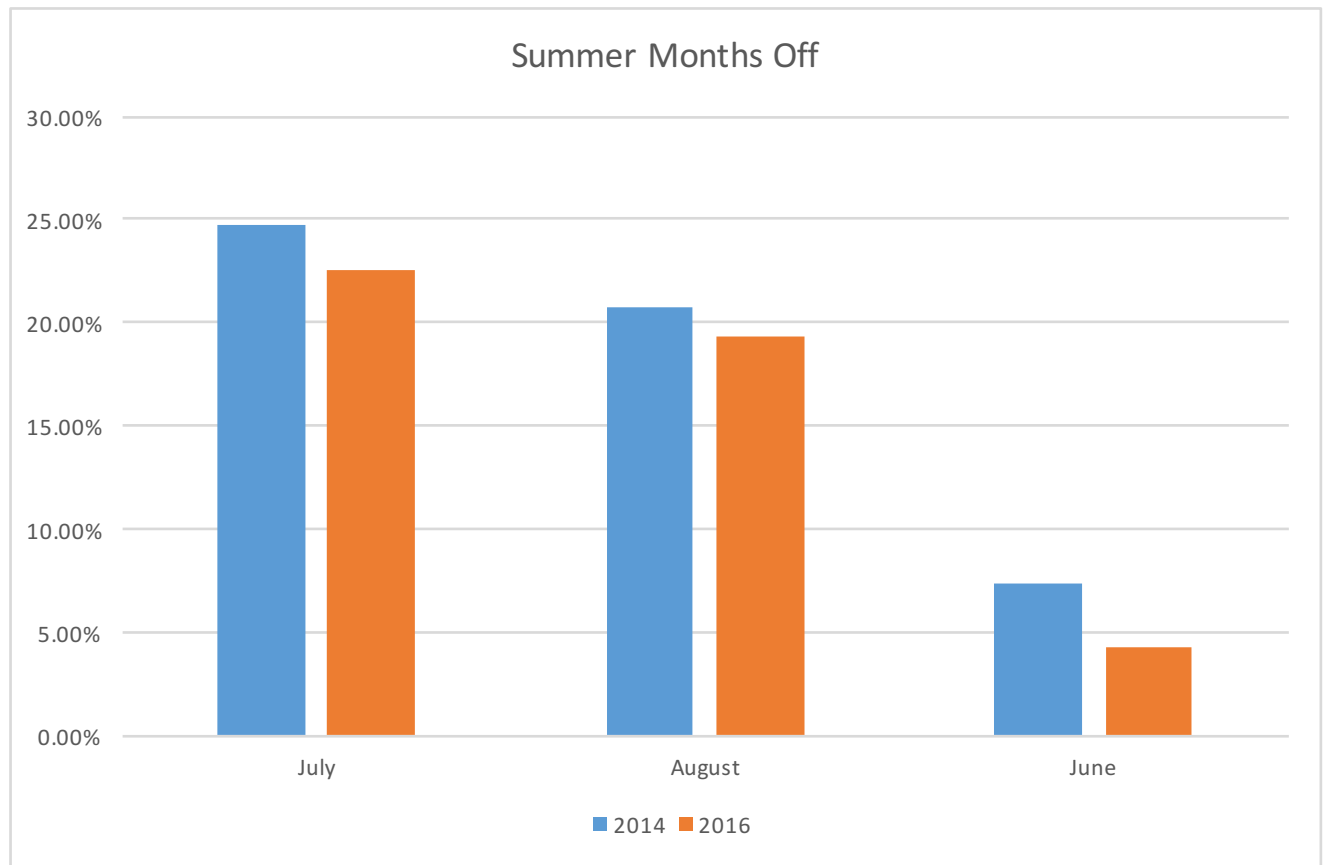
About one fifth (22.52%) of programs closed in July, 19.28% in August, and 4.32% in June. This summer time off trend has not changed significantly since 2014, but more programs stayed open during the summer months.

Programs in New Hampshire operated within a broad range of hours per week (from 3 to 101 hours), with an average of 45.60 and median of 51.25 hours. Programs operating Partial Day

Only had an average of 20.99 and median of 20 hours per week, while programs operating Full

Day Only and Full and Partial Day had an average of 52.56 and median of 53.75 hours. There

remained very little care available on weekends among all programs. Only 2 programs were open on Saturday or Sunday, reduced from 5 in 2014.



## Special Care

There were only 11 (1.97%) programs that offered special care, a slight decrease from 13 (2.06%) in 2014. Among those, 9 provided care from 7 to 9 PM, 3 provided care from 9 to 11 PM, 2 provided overnight care, and none provided care primarily for sick children. Of these programs, six were family based and five were center based.

## **Schedule**

More than half of licensed programs (56.17%, up from 52.73% in 2014) offered parents options of full and part-time care. Slightly more than one-fifth (21.82%) offered only a partial day schedule, and about the same number of programs (21.65%) offered full day only programs.

## **Licensed Capacity, Enrollment, and Attendance**

We wanted to differentiate between licensed capacity (the maximum number of children a program has been licensed to serve), the desired capacity (the number a program would like to enroll), the actual enrollment (the number of children a program had enrolled on December 2, 2015), and attendance (the number of children attending on that day).

- Mean and median Licensed Capacity among all programs in New Hampshire were 51 and 38 children, while the reported average (mean) and median enrollment were 41 and 28 children.
- Mean and median Desired Capacity were 46 and 32 children.
- The mean and median number of children attending on December 2, 2015 was still lower, at 34 and 24.
- Of those attending on December 2, 2015, on average (mean) 76.45% were full fee paying (non child care scholarship) children, slipping from 82.24% in 2014.
- Of those attending, on average 17.60% of children had DHHS scholarships, a noticeable decrease from 24.23% in 2014.

## **Charges to Scholarship Families**

For children receiving the NH Child Care Scholarship, more than half (51.16%) of licensed programs charged the DHHS-assigned cost share to parents and almost one fifth (18.60%) did not. The remaining programs (27.73%) chose 'Does not Apply'. The response rate for this question is 97.50%.

Similarly, for children receiving the NH Child Care Scholarship, 54.56% charged parents the difference between the maximum weekly standard rate (WSR) and the actual charge. 15.38% did not charge the difference while 27.73% chose 'Does not Apply'.

## NH Full-Time Child Care Rates

### Most Frequent Rate Type

Weekly rates were by far the most common way of charging for full-time care, and utilized by more than three quarters of providers (78.72%), a slight increase from 2014 (77.30%). Other types of charge frequencies were monthly (9.22%), up since 2014 (8.16%), daily (8.98%), which has decreased slightly from 2014 (10.97%), hourly (1.65%), yearly (0.95%), and bi-weekly (0.47%).

Rate Type	Number of Programs	Percentage
Weekly	333	78.72%
Monthly	39	9.22%
Daily	38	8.98%
Hourly	7	1.65%
Yearly	4	0.95%
Bi-weekly	2	0.47%

### Infant Care (6 weeks to 12 months)

#### Weekly Rates

The majority of programs (84.96%) charged for full-time infant care by the week, an increase from 2014 (77.30%). Remaining programs charged by the day (9.76%), the month (4.88%), and bi-weekly (0.41%).

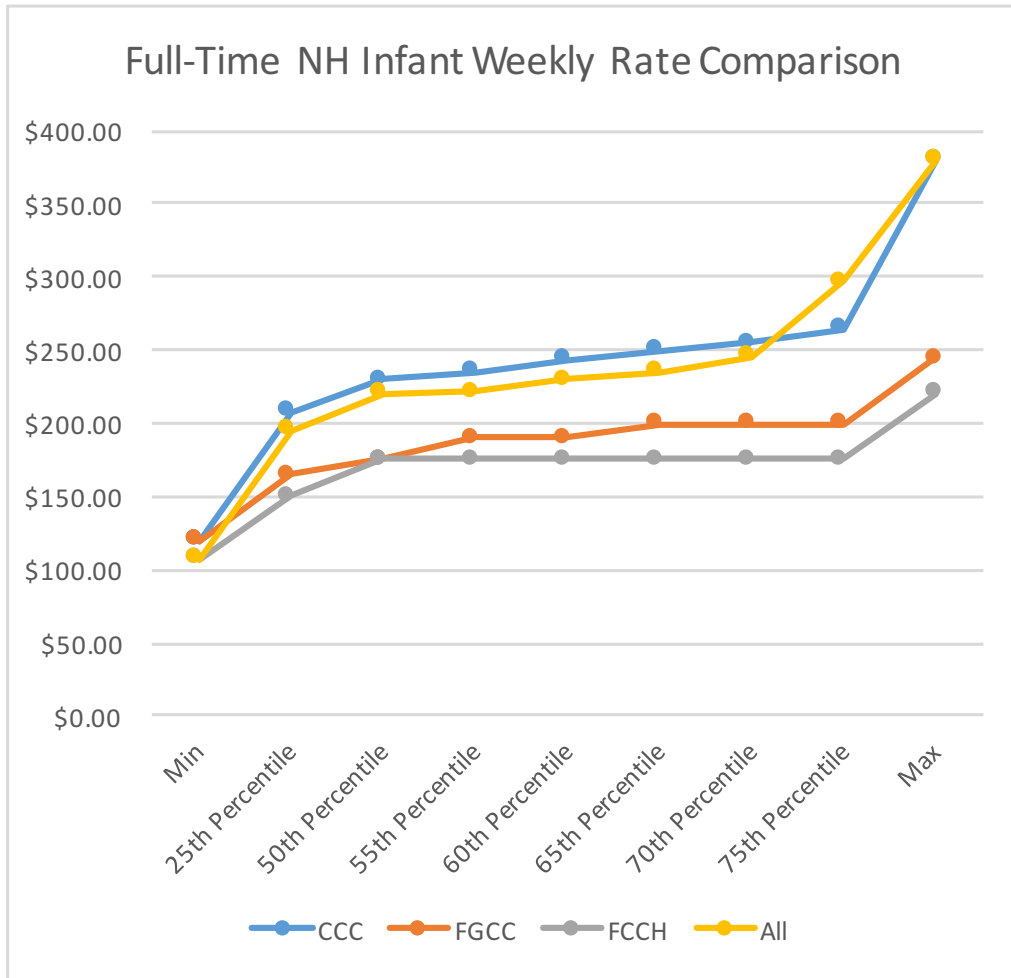
- 209 programs charged for full-time infant care by the week.
- The full-time weekly rate for children 6 weeks to 12 months ranged from \$107.00 to \$380.00.

- The full-time weekly rate for children 6 weeks to 12 months averaged (mean) \$226.08, which increased 4.99%, from \$215.33 in 2014.
- The median full-time weekly rate for children 6 weeks to 12 months was \$220.00, which increased 6.80%, from \$206.00 in 2014.

Full-time 6wks-12months weekly	Amount
Mean	\$226.08
Median	\$220.00
Std. Deviation	49.35
25 <sup>th</sup> Percentile	\$195.00
50 <sup>th</sup> Percentile	\$220.00
75 <sup>th</sup> Percentile	\$255.00
90 <sup>th</sup> Percentile	\$297.00

Child Care Centers (CCC) charged for infant care at consistently higher rates than either Family Group (FGCC) Child Care programs or Family Child Care Home (FCCH) programs. The mean weekly infant care rate at Child Care Centers was the highest (\$238.45), followed by Family Group Child Care (\$182.05), and Family Child Care Home programs (\$171.50). Child Care Centers charged \$56.40 (30.98%) more than Family Group Child Care programs, and \$66.95 (39.04%) more than Family Child Care Home programs.

Type	CCC	FGCC	FCCH	All
N	164	22	18	209
Min	\$120.00	\$120.00	\$107.00	\$107.00
Max	\$380.00	\$245.00	\$220.00	\$380.00
Mean	\$238.45	\$182.05	\$171.50	\$226.08
Std. Deviation	46.37	26.44	28.46	49.35
25 <sup>th</sup> Percentile	\$208.00	\$165.00	\$150.00	\$195.00
50 <sup>th</sup> Percentile	\$230.00	\$175.00	\$175.00	\$220.00
55 <sup>th</sup> Percentile	\$235.00	\$190.00	\$175.00	\$222.00
60 <sup>th</sup> Percentile	\$244.00	\$190.00	\$175.00	\$230.00
65 <sup>th</sup> Percentile	\$250.00	\$200.00	\$175.00	\$235.00
70 <sup>th</sup> Percentile	\$255.00	\$200.00	\$175.00	\$246.00
75 <sup>th</sup> Percentile	\$265.00	\$200.00	\$175.00	\$297.00



## Daily Rates

A few full-time Infant programs (9.76%) charged a daily rate, a decrease from 11.63% from 2014. The mean daily rate for children 6 weeks to 12 months was \$42.08, almost unchanged from \$42.00 in 2014, while the median daily rate for children 6 weeks to 12 months was \$42.00, which has risen 5% from \$40.00 of 2014.

Full-time 6wks-12months daily	Rate Amount
Mean	\$42.08
Median	\$42.00
Std. Deviation	7.65
25th Percentile	\$38.00
50th Percentile	\$42.00
75th Percentile	\$46.00
90th Percentile	\$50.00

## Toddler Care (13-24 months)

### Weekly Rates

The majority of programs (80.48%) charged for full-time toddler care by the week, almost unchanged from 2014 (80.15%). Remaining programs charged by the day (12.67%), the month (6.16%), and hourly (0.34%) and bi-weekly (0.34%).

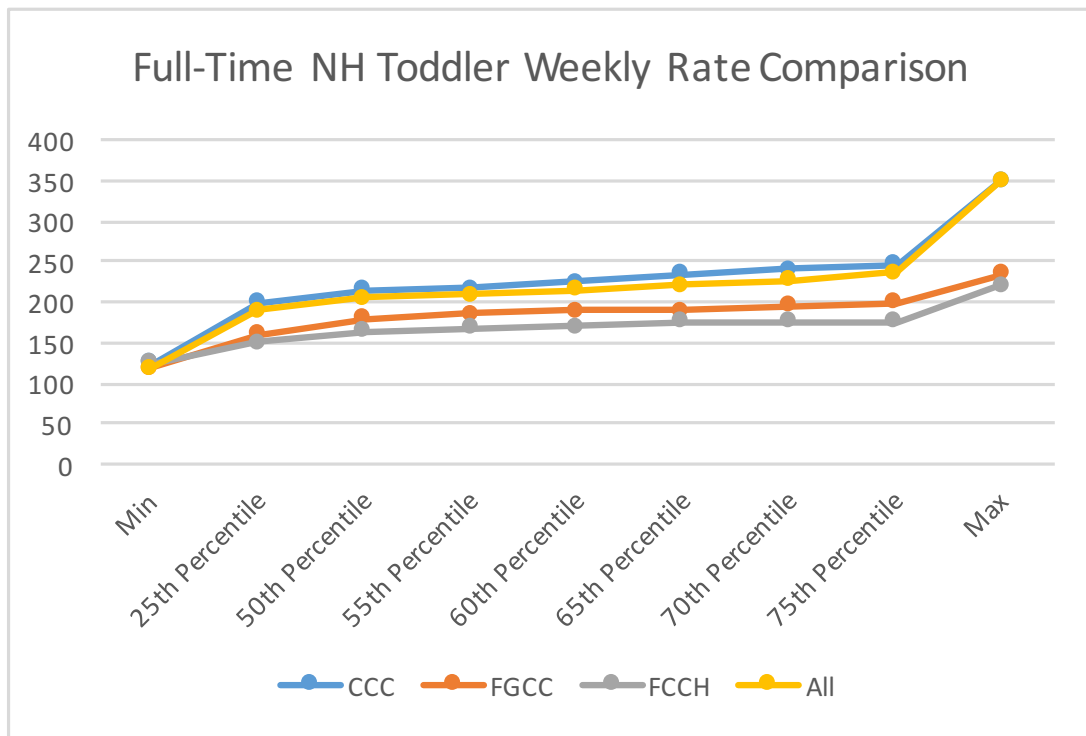
- 235 programs provided full time care for toddler children in December 2015 with weekly rates. Among those, 179 were Child Care Center programs, 24 Family Group Child Care programs, and 25 Family Child Care Home programs.
- The full-time weekly rate for children 13-24 months ranged from \$120 to \$350.00.
- The full-time weekly rate for children 13-24 months averaged (mean) \$213.32, a 4.32% increase from \$204.48 in February of 2014.
- The median full-time weekly rate for children 13-24 months was \$205.00, a 2.5% increase from \$200.00 in February of 2014.

Full-time 13-24 months weekly	Amount
Mean	\$213.32
Median	\$205.00
Std. Deviation	42.67
25 <sup>th</sup> Percentile	\$190.00
50 <sup>th</sup> Percentile	\$205.00
75 <sup>th</sup> Percentile	\$236.00
90 <sup>th</sup> Percentile	\$260.00

Child Care Centers charged for toddler care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly toddler care rate at Child Care Centers was the highest (\$224.76), followed by Family Group Child Care (\$180.42) and

Family Child Care Homes (\$167.52). Child Care Centers charged \$44.34 (24.58%) more than Family Group Child Care programs, and \$57.24 (34.17%) more than Family Child Care Homes.

Type	CCC	FGCC	FCCH	All
N	179	24	25	235
Min	\$125.00	\$120.00	\$125.00	\$120.00
Max	\$350.00	\$235.00	\$220.00	\$350.00
Mean	\$224.76	\$180.42	\$167.52	\$213.32
Std. Deviation	40.37	25.00	23.07	42.67
25 <sup>th</sup> Percentile	\$200.00	\$160.00	\$150.00	\$190.00
50 <sup>th</sup> Percentile	\$215.00	\$180.00	\$165.00	\$205.00
55 <sup>th</sup> Percentile	\$218.00	\$185.00	\$168.00	\$210.00
60 <sup>th</sup> Percentile	\$225.00	\$190.00	\$170.00	\$215.00
65 <sup>th</sup> Percentile	\$234.00	\$190.00	\$175.00	\$220.00
70 <sup>th</sup> Percentile	\$240.00	\$195.00	\$175.00	\$226.00
75 <sup>th</sup> Percentile	\$247.00	\$200.00	\$175.00	\$236.00



## Daily Rates

A few full-time toddler programs (12.67%) charged a daily rate, almost unchanged from 12.36% in February of 2014.

- The mean daily rate for children 13-24 months was \$38.82, nearly the same as 2014 (\$38.27).
- The median daily rate for children 13-24 month was \$39.00, a \$2.00 (5.41%) increase from \$37.00 in 2014.

Full-time 13-24 months daily	Amount
Mean	\$38.82
Median	\$39.00
Std. Deviation	7.68
25 <sup>th</sup> Percentile	\$35.00
50 <sup>th</sup> Percentile	\$39.00
75 <sup>th</sup> Percentile	\$45.00
90 <sup>th</sup> Percentile	\$50.00

## Young Preschool Age Care (25-35 months)

### Weekly Rates

The majority of programs (81.62%) charged for care by the week, a slight increase from 78.13% in 2014. Remaining programs charged by the day (10.90%), the month (6.54%), the hour (0.62%), and bi-weekly (0.31%).

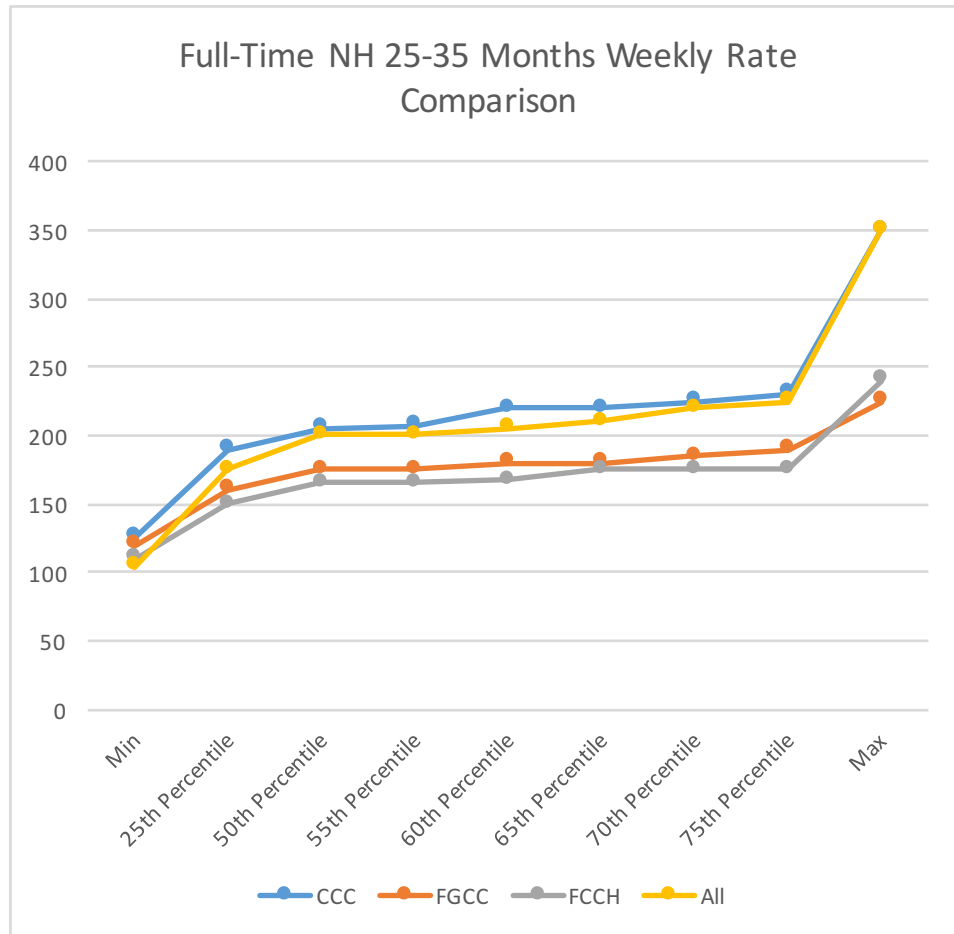
- 262 programs provided full time care in December 2015 and charged weekly rates. Among those, 196 were Child Care Center programs, 27 Family Group Child Care programs, and 31 Family Child Care Home programs.

- The full-time weekly rate for children 25-36 months ranged from \$103.62 to \$350.00.
- The full-time weekly rate for children 25-35 months averaged (mean) \$202.75, which increased 3.39% from \$196.10 in 2014.
- The median full-time weekly rate for children 25-35 months was \$200.00, which increased 6.38% from \$188.00 in 2014.

Full-time 25-35 months weekly	Amount
Mean	\$202.75
Median	\$200.00
Std. Deviation	40.75
25 <sup>th</sup> Percentile	\$175.00
50 <sup>th</sup> Percentile	\$200.00
75 <sup>th</sup> Percentile	\$225.00
90 <sup>th</sup> Percentile	\$250.00

Child Care Centers charged for young preschooler care at higher rates than either Family Group Child Care and Family Child Care Home programs. The mean weekly young preschooler rate at Child Care Centers was the highest (\$213.58), followed by Family Group Child Care programs (\$175.19), and Family Child Care Home programs (\$163.39). Similarly, the median weekly rate at Child Care Centers was the highest (\$205.00), followed by Family Group Child Care (\$175.00) and Family Child Care Homes (\$165.00).

	CCC	FGCC	FCCH	All
N	196	27	31	262
Min	\$125.00	\$120.00	\$110.00	\$103.62
Max	\$350.00	\$225.00	\$240.00	\$350.00
Mean	\$213.58	\$175.19	\$163.39	\$202.75
Std. Deviation	38.81	21.58	25.31	40.75
25 <sup>th</sup> Percentile	\$190.00	\$160.00	\$150.00	\$175.00
50 <sup>th</sup> Percentile	\$205.00	\$175.00	\$165.00	\$200.00
55 <sup>th</sup> Percentile	\$207.00	\$175.00	\$165.00	\$200.00
60 <sup>th</sup> Percentile	\$220.00	\$180.00	\$167.00	\$205.00
65 <sup>th</sup> Percentile	\$220.00	\$180.00	\$175.00	\$210.00
70 <sup>th</sup> Percentile	\$225.00	\$185.00	\$175.00	\$220.00
75 <sup>th</sup> Percentile	\$231.00	\$190.00	\$175.00	\$225.00



## Daily Rates

A few full-time programs (10.90%) charged a daily rate, a 1.95% decrease from 12.85% in February of 2014.

- The mean daily rate for children 25-35 months was \$38.18, a 5.25% increase from \$36.18 in February of 2014.
- The median daily rate for children 25-35 months was \$38.00, a \$1.00 (2.70%) increase in the last two years.

Full-time 25-35 months daily	Amount
Mean	\$38.18
Median	\$38.00
Std. Deviation	7.15
25 <sup>th</sup> Percentile	\$33.00
50 <sup>th</sup> Percentile	\$38.00
75 <sup>th</sup> Percentile	\$42.00
90 <sup>th</sup> Percentile	\$50.00

## **Preschool Aged Care (36-59 months)**

### **Weekly Rates**

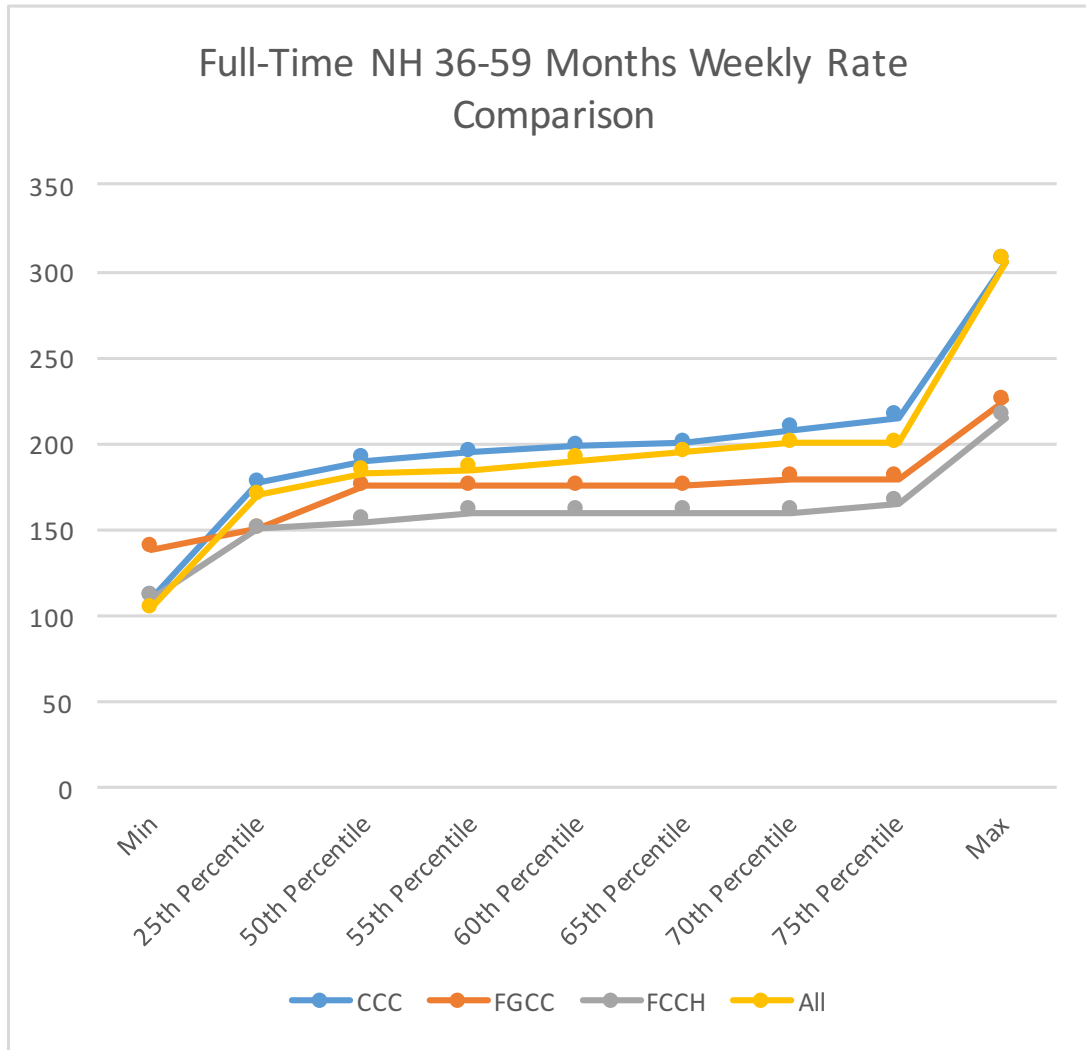
The majority of programs (76.87%) charged for full-time preschool care by the week, a slight increase from February 2014 (74.78%). Remaining programs charged by the day (11.57%), the month (9.00%), the hour (0.62%), and bi-weekly (0.31%).

- 299 programs provided full time care for preschool children in December 2015 and charge by the week. Among those, 213 were Child Care Center programs, 35 Family Group Child Care programs, and 37 Family Child Care Home programs.
- The full-time weekly rate for preschool children ranged from \$103.62 to \$306.
- The full-time weekly rate for preschoolers averaged (mean) \$188.12, which increased 3.44%, from \$181.87 in 2014.
- The median full-time weekly rate for preschoolers was \$183, which increased 4.27%, from \$175.50 in 2014.

Full-time 36-59 months weekly	Amount
Mean	\$188.12
Median	\$183.00
Std. Deviation	34.12
25 <sup>th</sup> Percentile	\$170.00
50 <sup>th</sup> Percentile	\$183.00
75 <sup>th</sup> Percentile	\$200.00
90 <sup>th</sup> Percentile	\$232.00

Child Care Centers charged for preschool care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly preschool care at Child Care Centers was the highest (\$197.29), followed by Family Group Child Care programs (\$170.54) and Family Child Care Home programs (\$155.61). Child Care Centers charged \$26.75 (15.69%) more than Family Group Child Care programs, and \$41.68 (26.78%) more than Family Child Care Home programs.

Preschool Aged Care Weekly	CCC	FGCC	FCCH	All
N	213	35	37	299
Min	\$110.00	\$139.00	\$110.00	\$103.62
Max	\$306.00	\$225.00	\$215.00	\$306.00
Mean	\$197.29	\$170.54	\$155.61	\$188.12
Std. Deviation	33.46	18.28	21.98	34.12
25 <sup>th</sup> Percentile	\$177.00	\$150.00	\$150.00	\$170.00
50 <sup>th</sup> Percentile	\$190.00	\$175.00	\$155.00	\$183.00
55 <sup>th</sup> Percentile	\$195.00	\$175.00	\$160.00	\$185.00
60 <sup>th</sup> Percentile	\$198.00	\$175.00	\$160.00	\$190.00
65 <sup>th</sup> Percentile	\$200.00	\$175.00	\$160.00	\$195.00
70 <sup>th</sup> Percentile	\$208.00	\$180.00	\$160.00	\$200.00
75 <sup>th</sup> Percentile	\$215.00	\$180.00	\$165.00	\$200.00



### Daily Rates

A few full-time preschool programs (11.57%) charged a daily rate, a 2.08% decrease from 13.65% in February of 2014.

- The mean daily rate for preschool children was \$35.93, a \$1.58 (4.60%) increase from \$34.35 in February of 2014.
- The median daily rate for preschool children was \$35.00, a \$1.50 (4.48%) increase from \$33.50 of 2014.

Preschool Aged Care Daily	Amount
Mean	\$35.93
Median	\$35.00
Std. Deviation	8.13
25 <sup>th</sup> Percentile	\$30.00
50 <sup>th</sup> Percentile	\$35.00
75 <sup>th</sup> Percentile	\$41.00
90 <sup>th</sup> Percentile	\$50.00

## Care for Children Between Five and Six Years Old

### Weekly Rates

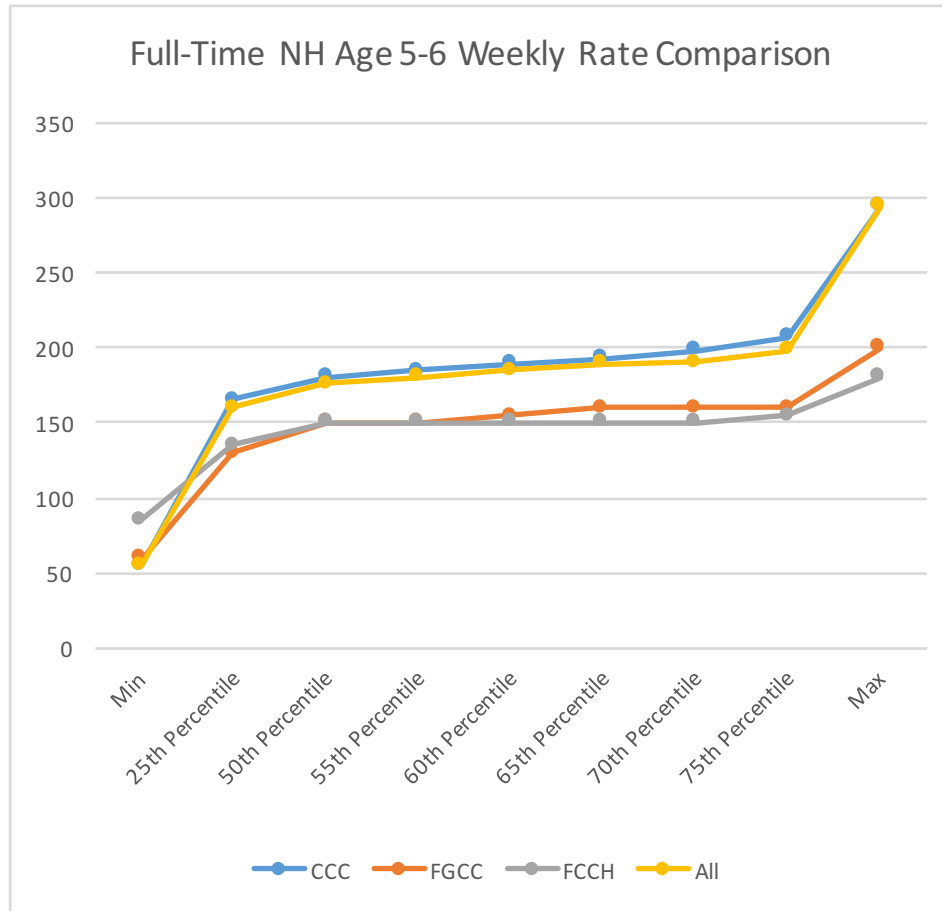
The majority of such programs (75.89%) charged for full-time care by the week, an increase from February 2014 (73%). Remaining programs charged by the day (9.82%), the month (10.71%), and the hour (1.79%) and the year (1.79%).

- 170 programs provided full time care for five to six-year-old children in 2015 with weekly rates. Among those, 135 were Child Care Center programs, 16 Family Group Child Care programs, and 10 Family Child Care Home programs.
- The full-time weekly rate for children between five and six ranged from \$55 to \$294.
- The full-time weekly rate for children between five and six averaged (mean) \$179.03, which increased 3.47%, from \$173.02 in 2014.
- The median full-time weekly rate for children between five and six was \$176, which hasn't changed much from \$175 in 2014.

Full-Time Age 5-6 Weekly	Amount
Mean	\$179.03
Median	\$176.00
Std. Deviation	43.78
25 <sup>th</sup> Percentile	\$160.00
50 <sup>th</sup> Percentile	\$176.00
75 <sup>th</sup> Percentile	\$198.00
90 <sup>th</sup> Percentile	\$234.00

Child Care Centers charged for age 5-6 care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly rate at Child Care Centers was the highest (\$186.04), followed by Family Child Care Home programs (\$144.45) and Family Group Child Care programs (\$143.75). Child Care centers charged \$41.59 (28.79%) more than Family Child Care Home programs, and \$42.29 (29.42%) more than Family Group Child Care programs.

Full-Time Age 5-6 Weekly	CCC	FGCC	FCCH	All
N	135	16	10	170
Min	\$55.00	\$60.00	\$85.00	\$55.00
Max	\$294.00	\$200.00	\$180.00	\$294.00
Mean	\$186.04	\$143.75	\$144.45	\$179.03
Std. Deviation	43.16	40.06	23.64	43.78
25 <sup>th</sup> Percentile	\$165.00	\$130.00	\$135.00	\$160.00
50 <sup>th</sup> Percentile	\$180.00	\$150.00	\$150.00	\$176.00
55 <sup>th</sup> Percentile	\$185.00	\$150.00	\$150.00	\$180.00
60 <sup>th</sup> Percentile	\$189.00	\$155.00	\$150.00	\$185.00
65 <sup>th</sup> Percentile	\$193.00	\$160.00	\$150.00	\$189.00
70 <sup>th</sup> Percentile	\$198.00	\$160.00	\$150.00	\$190.00
75 <sup>th</sup> Percentile	\$207.00	\$160.00	\$155.00	\$198.00



## Daily Rates

A few full-time age 5-6 programs (11.57%) charged a daily rate, a 1.93% decrease from 13.5% in February of 2014.

- The mean daily rate for age 5-6 was \$35.93, a \$3.97 (12.42%) increase from \$31.96 in February of 2014.
- The median daily rate for age 5-6 was \$35.00, a \$5 (16.67%) increase from \$30.00 in the last two years.

Full-Time Age 5-6 Daily	Amount
Mean	\$35.93
Median	\$35.00
Std. Deviation	8.13
25 <sup>th</sup> Percentile	\$30.00
50 <sup>th</sup> Percentile	\$35.00
75 <sup>th</sup> Percentile	\$41.00
90 <sup>th</sup> Percentile	\$50.00

## NH Part-Time Child Care Rates

### Frequent Rate Charge Type

Daily and weekly rates were by far the most common way of charging for part-time care, and utilized by close to three quarters of providers combined (74.14%). Other types of charge frequencies were monthly (16.09%), hourly (7.65%), yearly (1.58%), bi-weekly (0.26%) and quarterly (0.26%).

Rate Type	Number of Programs	Percentage
Daily	150	39.58%
Weekly	131	34.56%
Monthly	61	16.09%
Hourly	29	7.65%
Yearly	6	1.58%
Bi-weekly	1	0.26%
Quarterly	1	0.26%

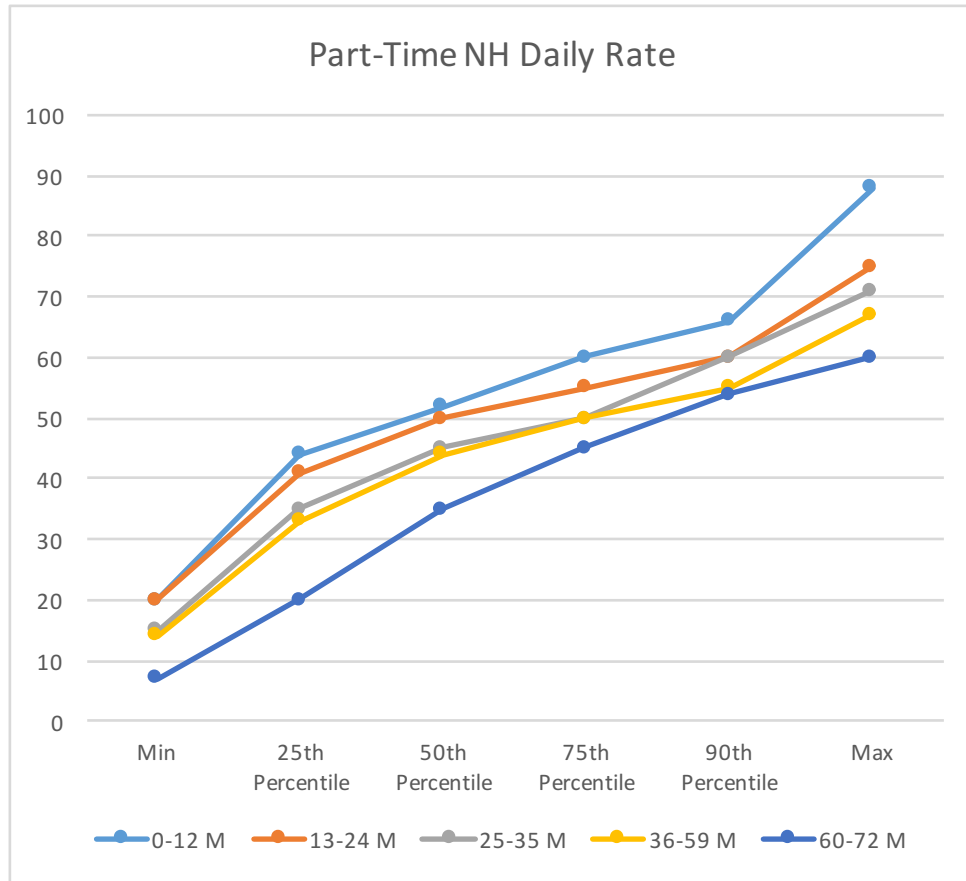
### Part-Time Rates

With the exception of School Age programs, which charged most often by the week, the most common part-time rates charged were by the day: 67.0% for infant, 58.40% for toddler, 57.74% for young preschoolers, 45.53% for preschoolers, and 41.51% for 60-72 months' care.

- The mean daily rate for infant care (0-12 months) was \$52.10, a \$2.41 increase (4.85%) from \$49.69 in February of 2014, while the median was \$52.00, a \$2.00 increase (4%) from \$50.00 from 2014.
- The mean daily rate for toddler care (13-24 months) was \$48.25, changed little from \$48.03 from 2014, while the median was \$50.00, unchanged from 2014.

- The mean daily rate for young preschoolers (25-35 months) was \$42.98, dropped slightly from \$43.75, while the median was \$45, unchanged from 2014.
- The mean daily rate for preschoolers (36-59 months) was \$40.38, a 7.57% increase from \$37.54 in February of 2014, while the median was \$44, a 10% increase from \$40 from 2014.
- The mean daily rate for 60-72 months was \$33.84, a \$2.11 decrease from 2014, while the median rate was \$35, a \$2 decrease from 2014.

Part-Time Daily	0-12 M	13-24 M	25-35 M	36-59 M	60-72 M
Min	\$20.00	\$20.00	\$15.00	\$14.00	\$7.00
Max	\$88.00	\$75.00	\$71.00	\$67.00	\$60.00
Mean	\$52.10	\$48.25	\$42.98	\$40.38	\$33.84
Std. Deviation	13.10	10.97	12.71	12.49	14.68
25 <sup>th</sup> Percentile	\$44.00	\$41.00	\$35.00	\$33.00	\$20.00
50 <sup>th</sup> Percentile	\$52.00	\$50.00	\$45.00	\$44.00	\$35.00
75 <sup>th</sup> Percentile	\$60.00	\$55.00	\$50.00	\$50.00	\$45.00
90 <sup>th</sup> Percentile	\$66.00	\$60.00	\$60.00	\$55.00	\$54.00



## School Age Rates

For school age care, we asked about before and after school, before school only, and after school only care. Among those, a weekly rate was the most frequent rate type charged.

- 85 (56.67%) programs offering before and after school care charged by the week, 35 (23.33%) by the day, 24 (16%) by the hour, and 6 (4%) by the month. The average weekly rate was \$84.18 and the median weekly rate was \$80.00.

Before & After School Weekly	All	School Age Only	CCC	FGCC	FCCH
N	85	16	47	15	7
Min	\$25.00	\$25.00	\$42.00	\$45.00	\$50.00
Max	\$189.00	\$120.00	\$189.00	\$180.00	\$85.00
Mean	\$84.18	\$75.69	\$93.26	\$78.67	\$62.14
Median	\$80.00	\$77.00	\$89.00	\$75.00	\$60.00
Std. Deviation	28.19	19.77	27.53	32.32	12.78
25 <sup>th</sup> Percentile	\$70.00	\$70.00	\$76.00	\$60.00	\$50.00
50 <sup>th</sup> Percentile	\$80.00	\$77.00	\$89.00	\$75.00	\$60.00
75 <sup>th</sup> Percentile	\$95.00	\$77.00	\$110.00	\$100.00	\$75.00
90 <sup>th</sup> Percentile	\$120.00	\$109.00	\$125.00	\$100.00	\$85.00

- 52 (44.44%) programs offering before school care only by the week, 38 (32.48%) by the day, 20 (17.09%) by the hour, and 7 (5.98%) by the month. The average weekly rate was \$53.92 while the median weekly rate was \$50.00.

Before School Only Weekly	All
N	52
Min	\$10.00
Max	\$138.00
Mean	\$53.92
Median	\$50.00
Std. Deviation	25.91
25 <sup>th</sup> Percentile	\$40.00
50 <sup>th</sup> Percentile	\$50.00
75 <sup>th</sup> Percentile	\$60.00
90 <sup>th</sup> Percentile	\$85.00

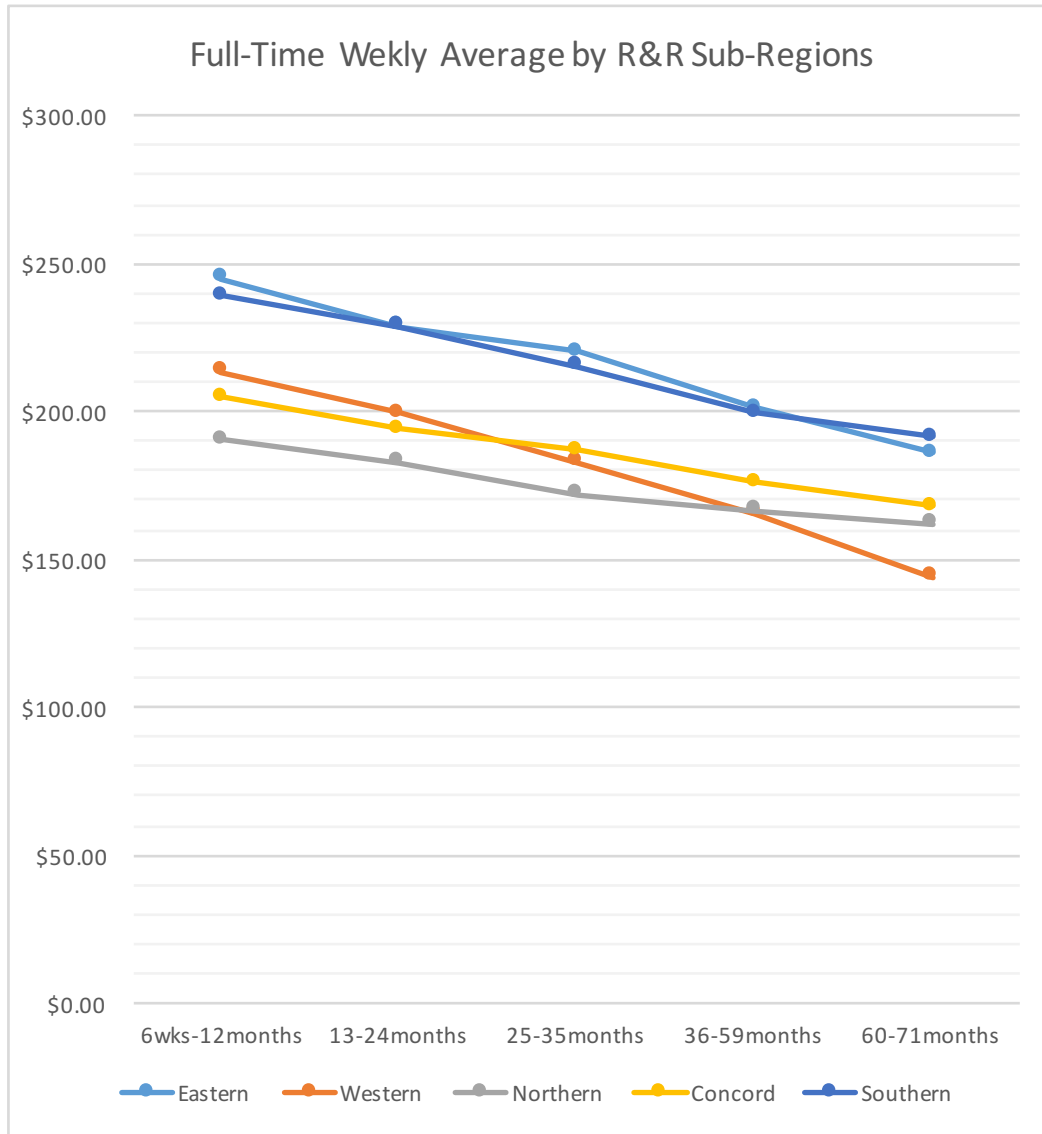
- 80 (43.96%) programs offering after school only charged by the week, 64 (35.16%) by the day, 28 (15.38%) by the hour, and 9 (4.95%) by the month. The average weekly rate was \$67.82 while the median weekly rate was \$62.00.

After School Only Weekly	All
N	80
Min	\$5.75
Max	\$180.00
Mean	\$67.82
Median	\$62.00
Std. Deviation	26.37
25 <sup>th</sup> Percentile	\$50.00
50 <sup>th</sup> Percentile	\$62.00
75 <sup>th</sup> Percentile	\$81.00
90 <sup>th</sup> Percentile	\$90.00

## NH Full-Time Rate Comparison by R&R Regions

Another approach to understanding market rates in child care is to consider variations across discrete geographic regions. For example, one might expect to see urban-rural differences, or north-south differences. The following sections compare the most common rate type (weekly) for full-time care across regions.

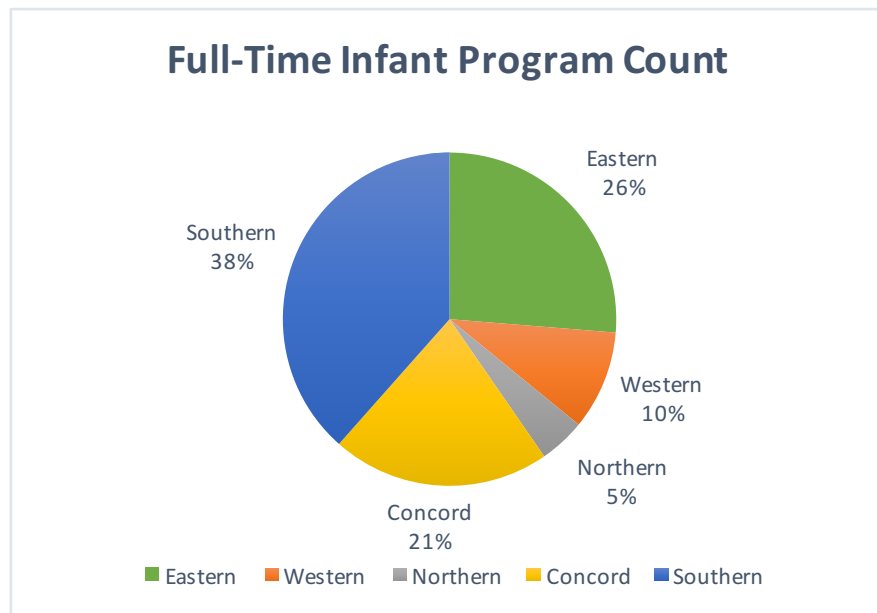
Full-Time Weekly Average	6wks-12 months	13-24 months	25-35 months	36-59 months	60-71 months
Eastern	\$245.20	\$228.79	\$220.42	\$201.38	\$185.86
Western	\$213.47	\$199.44	\$182.63	\$165.74	\$144.04
Northern	\$190.57	\$182.67	\$171.91	\$166.54	\$162.14
Concord	\$204.91	\$194.22	\$186.84	\$176.14	\$167.97
Southern	\$239.02	\$228.89	\$215.18	\$199.47	\$191.47



### Infant Care (6 weeks to 12 months)

- The NH infant care full-time weekly rate averaged \$226.08 and its median rate was \$220.00.
- Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below.

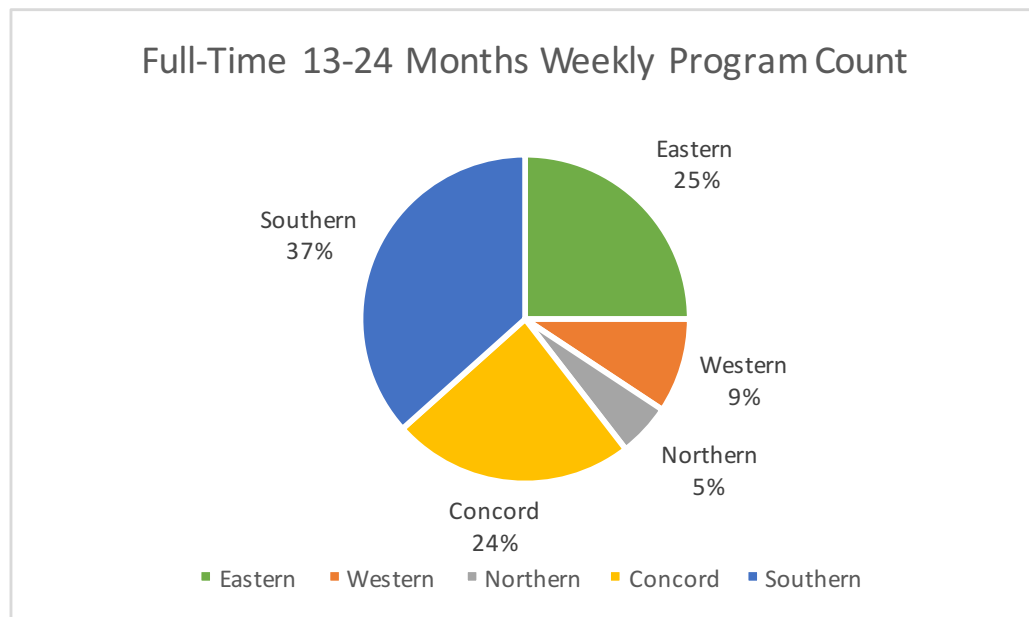
- Among all five regions, the highest mean and median were in the Eastern region while the lowest were in the Northern region.
- The rate difference was significant: The Eastern region's mean was \$54.63 (28.67%) higher and the median was \$60.00 (32.43%) higher than those of the Northern.
- The program count difference was significant as well: The Southern region contains almost nine times as many programs as those from the Northern region.



Full-Time Infant	Program Count	Mean	Median
Eastern	41	\$245.20	\$245.00
Western	15	\$213.47	\$205.00
Northern	7	\$190.57	\$185.00
Concord	33	\$204.91	\$200.00
Southern	60	\$239.02	\$225.00

**Toddler Care (13-24 months)**

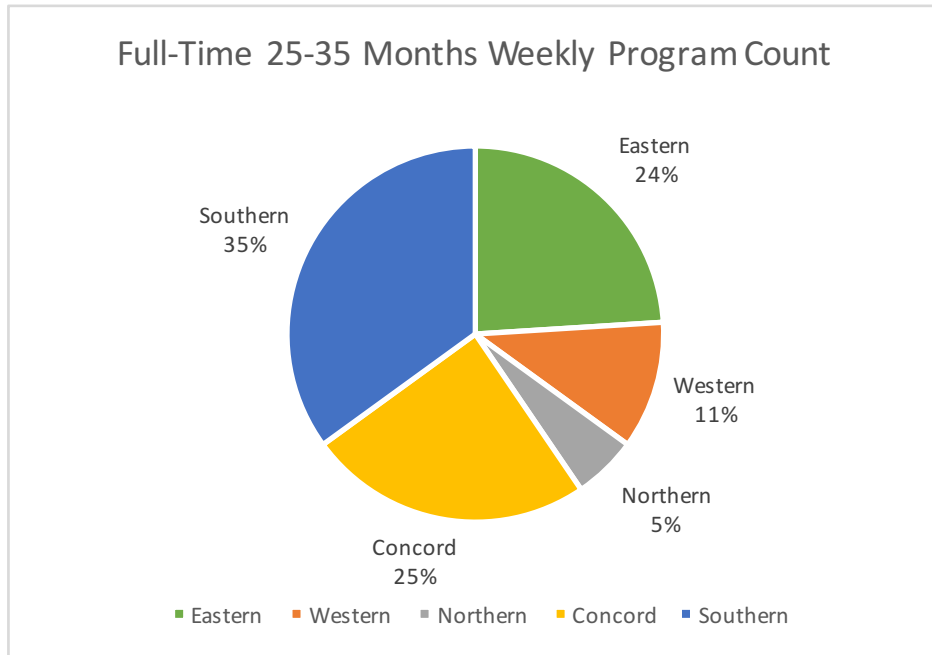
- The NH toddler care full-time weekly rate averaged \$213.32 and its median rate was \$205.
- The Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below.
- Among all five regions, the highest mean and median were from both the Eastern and Southern regions, while the lowest were in the Northern region.
- The Northern region's mean weekly was \$46.22 (25.30%) lower than the Southern region, while its median rate was \$40.00 (21.62%) lower than the Eastern region.
- The Southern region contains seven times as many programs (63) as that of the Northern region.



Full-Time 13-24 months	Program Count	Mean	Median
Eastern	43	\$228.79	\$225.00
Western	16	\$199.44	\$200.00
Northern	9	\$182.67	\$185.00
Concord	41	\$194.22	\$195.00
Southern	63	\$228.89	\$220.00

### **Young Preschool Age Care (25-35 months)**

- The NH young preschool age care full-time weekly rate averaged \$202.75 and its median rate was \$200.
- The Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below.
- Among all five regions, the highest mean and median were in the Eastern region while the lowest was in the Northern region.
- Compared to the region that charged the highest rates, the Northern region's mean weekly was \$48.52 (28.22%) and its median rate was \$45.00 (25.71%) lower.
- The Southern region contains almost seven times as many programs (70) as that (11) of the Northern region.

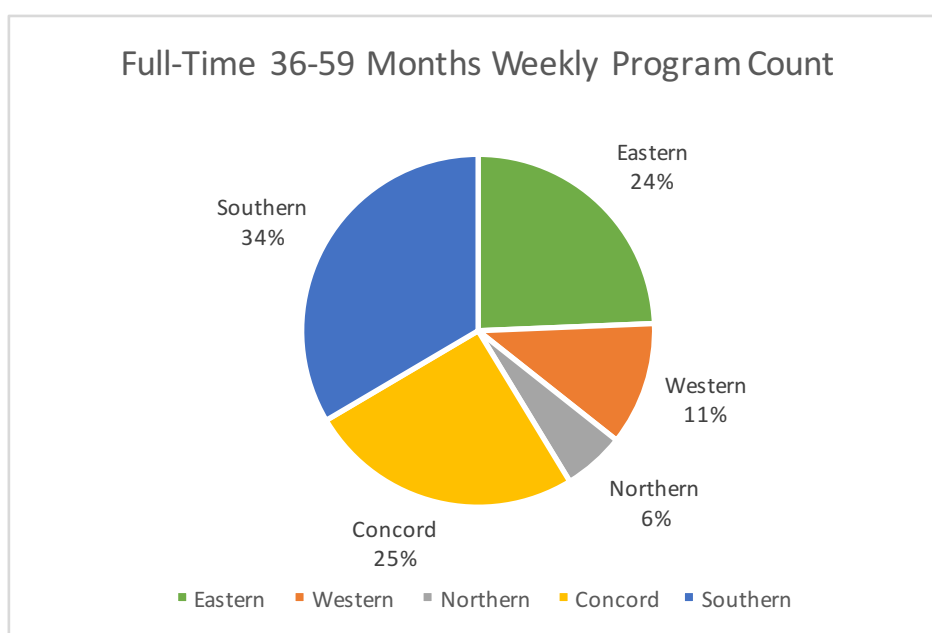


Full-Time 25-35 months	Program Count	Mean	Median
Eastern	48	\$220.42	\$220.00
Western	22	\$182.63	\$175.00
Northern	11	\$171.91	\$175.00
Concord	49	\$186.84	\$185.00
Southern	70	\$215.18	\$206.00

### Preschool Aged Care (36-59 months)

- The NH preschool age care full-time weekly rate averaged \$188.12 and its median rate was \$183.
- The Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below.
- Among all five regions, the highest mean and median were in the Eastern region while the lowest was in the Northern region.

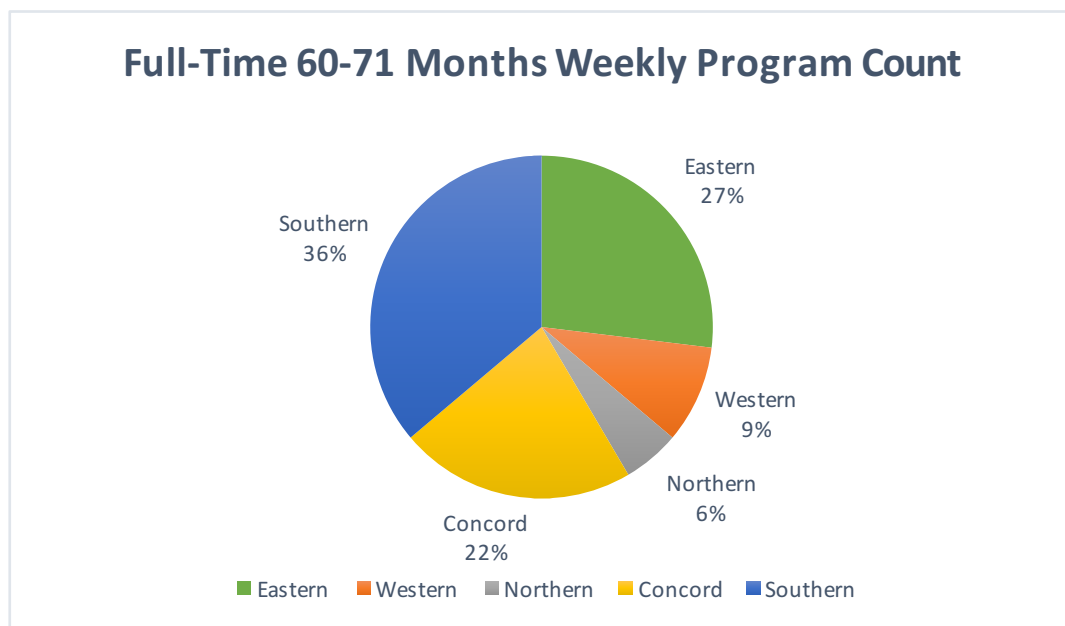
- Compared to the region that charged the highest rates, the Western region's mean weekly was \$35.64 (21.50%) lower and the Northern region's median weekly was \$30.00 (18.18%) lower.
- The Southern region contained almost six times as many programs (77) as that of the Northern region (13).



Full-Time 36-59 months	Program Count	Mean	Median
Eastern	56	\$201.38	\$195.00
Western	26	\$165.74	\$170.00
Northern	13	\$166.54	\$165.00
Concord	58	\$176.14	\$175.00
Southern	77	\$199.47	\$192.00

## Care for Children Between Five and Six Years Old

- The NH age 5-6 care full-time weekly rate averaged \$179.03 and its median rate was \$176.
- The Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below.
- Among all five regions, the highest mean was in Southern region and highest median in the Eastern, while the lowest was in the Western region.
- Compared to the highest mean rate from the Southern region, the Western's was \$47.43 (32.93%) lower.
- Compared to the highest median rate from the Eastern region, the Western's was \$40.00 (25.81%) lower.
- Program count was the largest from the Southern region (47) and lowest (7) from the Northern region.



Full-Time 60-71 months	Program Count	Mean	Median
Eastern	35	\$185.86	\$195.00
Western	12	\$144.04	\$155.00
Northern	7	\$162.14	\$160.00
Concord	29	\$167.97	\$175.00
Southern	47	\$191.47	\$180.00

# Poverty and Access to Early Childhood Programs

## Introduction

America has a higher rate of childhood poverty than all but a few developed nations.

*Children are America's poorest age group. In 2013, more than 12 million children lived below the poverty line, which for a family of four is slightly more than \$24,000 a year. This comes to roughly 17 percent of American children.<sup>1</sup>*

A recent Policy Brief on finalizing CCDF state plans recommended that states consider incorporating six policies and actions, including:

*Make high-quality child care and early education programs accessible and affordable for low-income families, particularly those living in underserved areas or in areas with concentrations of poverty.<sup>2</sup>*

In order to provide a context for understanding NH poverty and access to child care, this chapter will review information regarding NH current and projected overall population, young child population, and overall poverty. It will briefly identify poverty in all ten New Hampshire counties, and focus in more detail on access to child care in two counties and New Hampshire's largest city. Data for the following section comes from several sources, and was published between 2012 and 2015. Therefore, a bit of caution must be exercised in comparing information from the different sources.

## Child Care

Access to reliable, licensed child care is a critical need for working parents. In 2012,

approximately 69 percent of New Hampshire children under 6 years of age had all of their parents in their family in the workforce, a slight increase from 67 percent in 2009.<sup>3</sup> As of October 26, 2015, there were 902 licensed programs in New Hampshire, with 717 centers and 185 family child care programs. There was a total child capacity of 46,520, with 44,410 in centers and 2,110 in family child care programs.<sup>6</sup>

## **NH Population Projections**

The population of New Hampshire as of July 2015 was estimated at 1,330,608, an increase of just 1.1 percent from April 2010. Our population is projected to increase about 8% over the next 25 years, with the absolute number of births declining, and natural deaths increasing. The population both over 65 and also over 85 will increase, but the population under 15 is projected to fall. Our population is greying. According to Johnson<sup>5</sup> “a rapid increase in the senior population is inevitable and coming soon. The population age 65 and over will almost certainly double in the next two decades. In contrast, the number of children in the state diminished between 2000 and 2010, and the number of young adults and family-age residents increased only modestly.” The state’s child population is changing, and two-thirds of NH children now live in the southern-most third of the state.<sup>3</sup> One person out of twenty (4.9%) was under five years of age, a reduction from 5.3% in 2010. One out of six (15.9%) was 65 years or older, an increase of 2.4%. New Hampshire had the fourth highest median age in 2010, and was one of the three states with the highest increase in median age between 2000 and 2010.<sup>4</sup>

Population increases will be assisted by a projected increase in migrants to the state. More than 9 out of 10 NH persons (94%) are White, with Asians the largest minority at 2.5%. Only 5.6% are foreign born. Johnson projects an increasing state concentration of women in their 30’s<sup>5</sup>, and

notes that the diversity of the child population is increasing more rapidly than that of the adult population. About nine percent of the child population is now non-white.<sup>3</sup> Children with minority backgrounds grew to 12.2% of the child population in 2010, situated primarily in the Concord-Nashua corridor, Hanover-Lebanon region and a few areas of the Seacoast, with the largest concentration in Manchester. In the Concord-Manchester-Nashua corridor populations of children with minority backgrounds exceeding 40 percent can be found in a number of places.<sup>5</sup>

## NH Poverty

New Hampshire had the fifth highest state per capita income at \$33,821 in 2014 and a median household income of \$65,986.<sup>6</sup> However, pockets of high poverty exist despite the lowest state poverty rates (at 9.2%) in the nation.<sup>5</sup> Many New Hampshire family incomes have not rebounded to their pre-2008 levels.<sup>3</sup> Poverty levels vary by location, and tend to be higher along the Maine Border and the North Country. As one example, 12.4 percent of the population and 21.6 percent of children (more than one in five) in the city of Rochester are below the poverty line<sup>5</sup>.

COUNTY	Population	Persons Sq. Mi.	Age 0-9	Age 20- 39	Age 60+	Median Household Income	Poverty <sup>12</sup>
BELKNAP	60,252	150.5	11%	20%	27%	\$60,782	10.20%
CARROLL	47,623	51.1	8%	18%	32%	\$52,393	9.60%
CHESHIRE	76,115	107.7	9%	23%	25%	\$56,652	12.80%
COOS	32,202	17.9	8%	20%	28%	\$42,407	13.20%
GRAFTON	89,658	52.5	9%	26%	26%	\$57,210	12.10%
HILLSBOROUGH	405,184	462.5	11%	26%	21%	\$71,422	8.70%
MERRIMACK	171,171	157.5	10%	25%	23%	\$62,418	9.70%
ROCKINGHAM	300,621	432.6	10%	22%	23%	\$79,922	5.90%
STRAFFORD	125,604	340.5	11%	28%	19%	\$58,976	12.20%
SULLIVAN	43,291	80.6	10%	21%	26%	\$56,851	9.10%

Poverty levels are highest for children, with the poverty level for children under 18 years of age at 11.1 percent,<sup>3</sup> and for children under 6 at 14%. Careful consideration of this most vulnerable of populations is critical. “An estimated 27.9 percent of New Hampshire families with children under the age of 18 are single-parent families. Women head 71.6 percent of these .... [s]ingle women whose children are under 5 years old have a poverty rate of 46.9 percent; nearly half of these families live below the poverty line.” Let’s briefly compare the ten New Hampshire counties on population, persons per square mile, three age groupings (0-9 years; 20-39 years, and 60 years and older), median household income, and poverty.<sup>8</sup>

County Populations: Hillsborough has, by far the greatest number of persons, while Coos, followed by Sullivan have the fewest. Hillsborough also has the greatest population density, with Coos the most sparsely populated per square mile. Coos is the only county where overall population is projected to decline through 2040, although every county is projected to have fewer births by that date.

Age Differences: Three counties (Belknap, Hillsborough, and Strafford) are tied for the highest percentage of children under nine years of age (11%), with Hillsborough followed by Strafford having the highest percentage of children under five years of age. Carroll and Coos are tied with the lowest percentage (8%) children under nine years of age, with Carroll followed by Coos with the smallest percentage of children under five years. Overall in New Hampshire, the percentage of persons under five years fell from 5.3% to 4.9% between 2010 and 2014<sup>11</sup>. Strafford has the highest percentage of persons between 20 and 39 years of age. Carroll is our oldest county, with nearly one in three (32%) aged 60 or older.

Income: Median household income is highest in Rockingham and lowest in Coos. The poverty rate in the state has steadily increased in almost all regions with the highest poverty rate in Coos and the lowest in Hillsborough. The greatest percentage increase from 2010 to 2012 was in Belknap and Grafton<sup>7</sup>. While the federal poverty threshold for a family of four with two children was \$23,624 in 2013, the National Center for Children in Poverty (updated 5/13/2015) estimates that families need an income about twice that to meet their basic needs.<sup>14</sup>

Let's now focus in on two of these counties: Coos county stands out on several of the preceding variables, and Sullivan county, which falls a bit higher on the scale. We'll also take a look at Manchester, our largest city. We'll include comments designed to provoke discussion regarding a long view for improving services, and to some degree ignore political ramifications. Our comments have been informed by various data sources as well as conversations with providers.

## **Coos County**

### Introduction

Coos County is the northernmost, and largest New Hampshire county at 1,795 square miles, and covers roughly one-fifth of the state. It is the most rural, had a 2014 population of 32,212, and has the fewest people (18.4) per square mile. With a median age of 47.9, about 20 percent higher than the NH median age of 41.8 years, it is the second oldest NH county, and tied with Carroll County for the smallest percentage of young children, with just 8% of the population aged 0-9 years, and 4.2% under 5. The White percentage of the population is 96.9. The per capita income in Coos County in 2014 was \$24,737, roughly three quarters of the NH average of \$33,821, with

a median household income of \$42,407, about two-thirds of the NH median of \$65,986.<sup>9</sup> Coos County had the highest rate of single-parent families at 37.4%.<sup>3</sup>

### Population Projections

Coos County is the only NH county to decrease in population since the 1970 census<sup>9</sup> and its population is projected to continue to decline, from 32,292 (2015) to 31,233 (2025). Births are projected to decline nearly nine percent, from 1,190 (2015-2020) to 1,086 (2020-2025), with the population of children aged 0-4 projected to experience nearly a 17 percent decline from 1,341 (2015) to 1,118 (2025).<sup>8</sup>

### Poverty

The Coos County 14.9% poverty rate was about one and a half times the overall NH rate, at 21% for children under 18<sup>12</sup>. In 2013 Coos County had the highest unemployment rate at 6.4% but experienced the greatest decline between 2009 and 2013, down from 7.9 percent.<sup>2</sup> Nearly half of students enrolled in public schools (48.3%) were eligible for free and reduced-price lunches.<sup>2</sup> Almost one-third (32.8%) of children under 18 were enrolled in the federal Supplemental Nutrition Assistance Program (SNAP) in 2013, and one third (32.2%) of children 0-4 were enrolled in the federal Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).

### Child Care

Coos County is reported to have the fewest licensed child care options, with 17 center based programs (1,021 child capacity in 2014) and one licensed home based program.<sup>6</sup> Five programs

are Licensed Plus and three are Accredited. Please see the Coos County: Licensed Child Care Facilities map for program locations.

### Coos County Market Rates

The current market rate study found the following for full-time weekly care:

Age	6-52 weeks	13-24 mos.	25-35 mos.	36-59 mos.	60-71 mos.
Program Number	3	3	4	4	1
Minimum Rate	\$165.00	\$150.00	\$150.00	\$150.00	NA
Maximum Rate	\$230.00	\$220.00	\$220.00	\$185.00	NA
Average Rate	\$206.67	\$185.00	\$181.25	\$166.25	NA
Median Rate	\$225.00	\$185.00	\$175.00	\$150.00	NA
Std. Deviation	29.53	28.58	25.09	16.35	NA
25 <sup>th</sup> Percentile	\$165.00	\$150.00	\$150.00	\$150.00	NA
50 <sup>th</sup> Percentile	\$225.00	\$185.00	\$175.00	\$150.00	NA
75 <sup>th</sup> Percentile	\$230.00	\$220.00	\$180.00	\$180.00	NA
90 <sup>th</sup> Percentile	\$230.00	\$220.00	\$220.00	\$185.00	NA

## Licensed Child Care Facilities Coos County, NH

### Group Child Care Center Programs

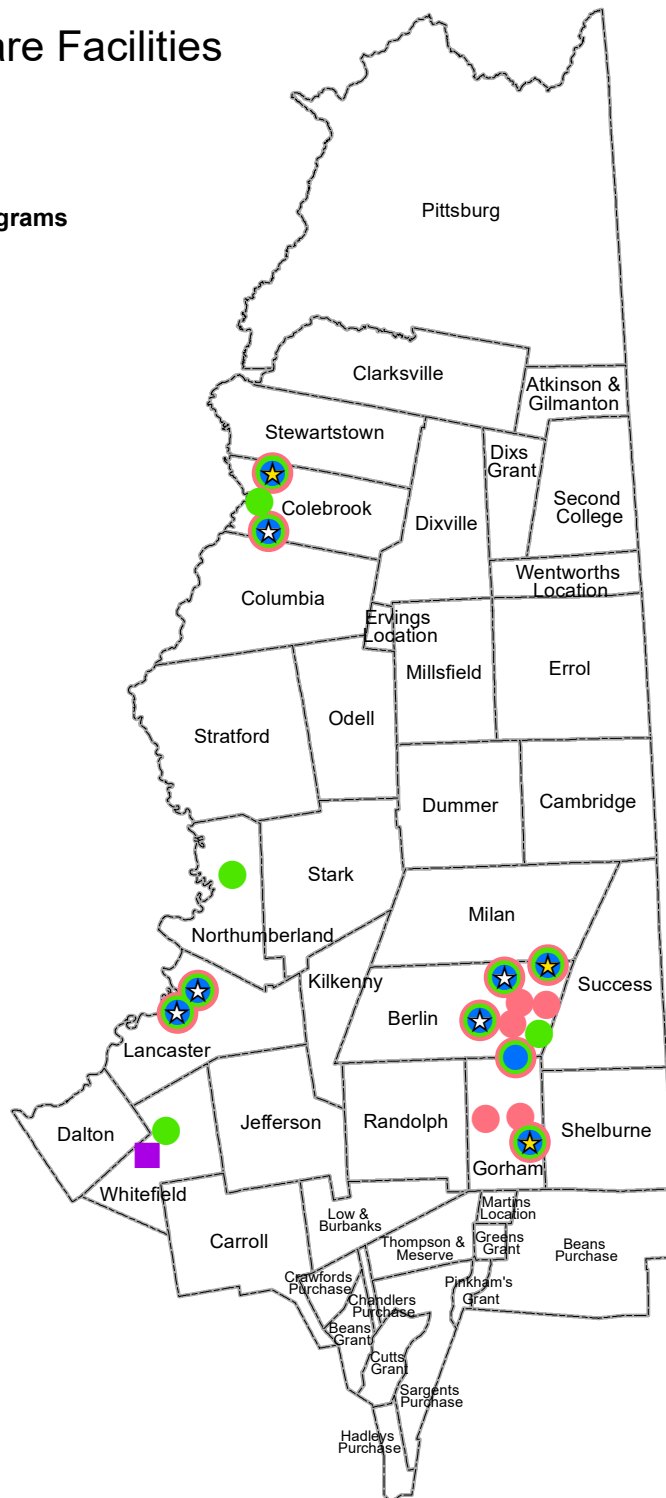
- Infant/Toddler Program
- Pre-School Program
- School Age Program

### Family-Based Programs

- Family-Based Facility

### Indicators of Quality

- ★ Accredited
- ☆ Licensed Plus



## **Sullivan County**

### Introduction

Sullivan County is a west central New Hampshire county bordering Vermont, with a 2015 population of 42,967, of which 96.7% are White. It has 80.6 people per square mile. The median age of 44.8 is about 10 percent higher than the NH median age of 41.8 years and tied with Merrimack and Rockingham Counties for the percentage of young children, with 10% of its population aged 0-9 years (N= 9,601), and 5% from 0-5 (N= 2,191).<sup>10</sup> The per capita income in Sullivan County in 2014 was \$29,073 roughly 90% of the NH average of \$33,821, and the median household income was \$56,851, again almost 90% of the NH median of \$65,986. The percentage of high school or equivalent graduates and those who have health insurance are below state-wide averages. Sullivan County ranks high in the disabled, those in poverty and the unemployed, according to the Nathan Kline Institute for Psychiatric Research.

### Population Projections

Over the last three decades Sullivan had the second-smallest population increase among NH counties<sup>6</sup>; only Coos County had a lower rate of growth.<sup>10</sup> While its population is projected to increase five percent over the next decade, births are projected to decline slightly with the population of children aged 0-4 projected to also experience a very slight decline.<sup>3</sup>

### Poverty

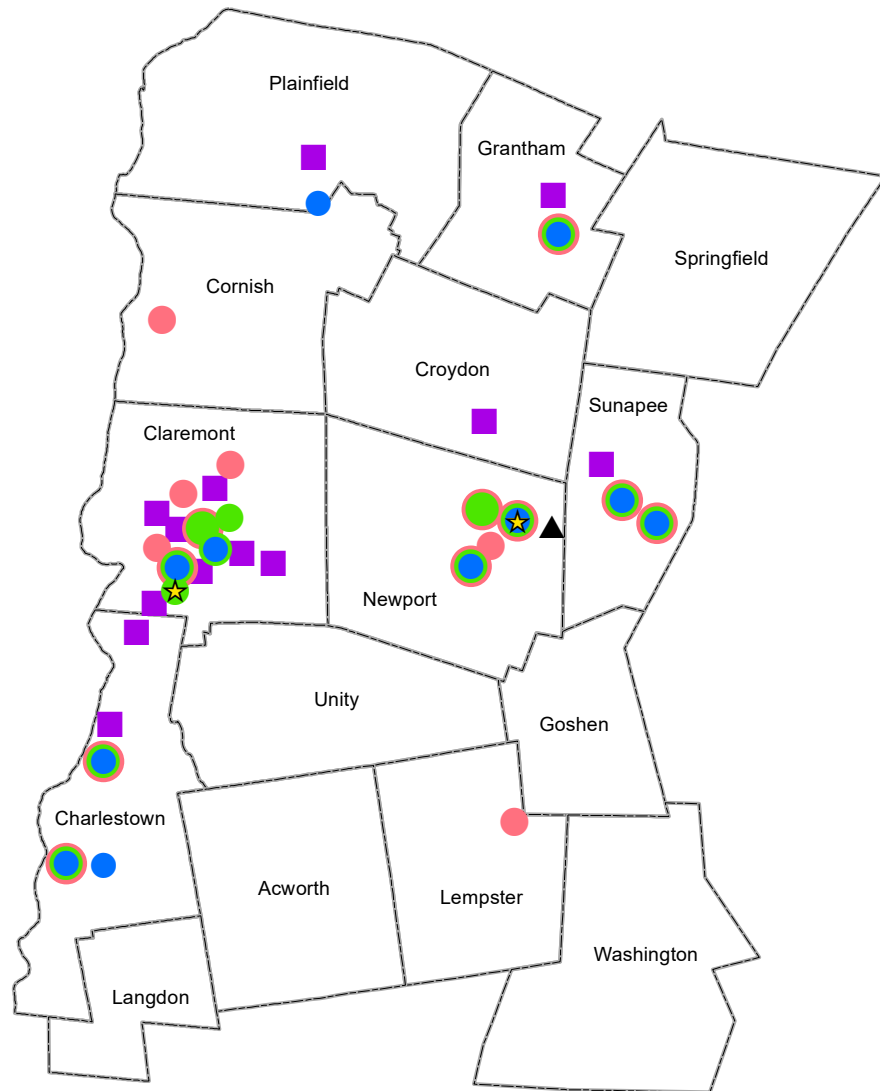
Its 9.1% poverty rate was slightly lower than the NH poverty rate of 9.2%, with a poverty rate of 11% for children under 18.<sup>12</sup> Sullivan County had the second highest rate of single-parent families at 33.1%, and an unemployment rate of 5.7% in 2009 and 4.5% in 2013. Two of every

five students enrolled in public school (39.7%) were eligible for free and reduced-price lunches. One in every four children under 18 (25.2%) were enrolled in the federal Supplemental Nutrition Assistance Program in 2013, and one in every four children 0-4 were enrolled in the federal Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).<sup>3</sup>

### Child Care

Sullivan County has 36 licensed facilities and a 2014 child care capacity of approximately 1,126 children.<sup>6</sup> There are no Licensed Plus programs in Sullivan County; two programs are Accredited. Please see the Licensed Child Care Facilities: Sullivan County map for program locations.

## Licensed Child Care Facilities Sullivan County, NH



### Group Child Care Center Programs

- Infant/Toddler Program
- Pre-School Program
- School Age Program

### Family-Based Programs

- Family-Based Facility
- ▲ Night Care Program

### Indicators of Quality

- ★ Accredited

### Sullivan County Market Rates

The Average Full-Time Weekly Rate in Sullivan County is slightly lower for Infants, and the Median is significantly lower than Coos County. Average and Median rates for other ages are similar or higher.

Age	6-52 weeks	13-24 mos.	25-35 mos.	36-59 mos.	60-71 mos.
Program Number	5	5	5	7	4
Percentage	100%	83.33%	83.33%	87.50%	100%
Minimum Rate	\$185.00	\$180.00	\$165.00	\$139.00	\$110.00
Maximum Rate	\$250.00	\$250.00	\$220.00	\$200.00	\$175.00
Average Rate	\$203.00	\$200.00	\$189.00	\$172.71	\$152.50
Median Rate	\$190.00	\$185.00	\$185.00	\$170.00	\$155.00
Std. Deviation	24.62	25.88	18.28	19.97	25.61
25 <sup>th</sup> Percentile	\$185.00	\$185.00	\$180.00	\$165.00	\$110.00
50 <sup>th</sup> Percentile	\$190.00	\$185.00	\$185.00	\$170.00	\$155.00
75 <sup>th</sup> Percentile	\$205.00	\$200.00	\$195.00	\$190.00	\$170.00
90 <sup>th</sup> Percentile	\$250.00	\$250.00	\$220.00	\$200.00	\$175.00

## **Manchester**

### Introduction

Manchester is New Hampshire's largest city, and the tenth largest city in New England, with a 2014 population of 110,448, a per capita income of \$27,557 and median household income of \$53,082<sup>12</sup>. There is a far greater population density per square mile here (3,337) than in Coos

(18.4) or Sullivan (81.4) counties. The White percentage of the population is 86.1%, and 13.2% of the population was foreign born. The American Community Survey indicated 6,548 children under 5, or 6% of the total. Nearly half (49 percent) of residents with minority backgrounds in the state live in Hillsborough County, and the Manchester-Nashua metropolitan area is the most diverse part of New Hampshire with reference to race and Hispanic origin. Concentrations of children with minority backgrounds are largest in the City of Manchester, with 30 percent of children having minority backgrounds. Here, neighborhoods with significant concentrations of children with minority backgrounds are tightly clustered in the urban core.

#### Population Projections

The population of the City of Manchester has increased slightly more than half of one percent between 2010 and 2015, and is projected to grow about five percent over the next 25 years.<sup>13</sup> The number of residents over 65 is expected to significantly increase over the next decade, with an anticipated increased demand for services for older adults.

#### Poverty

In the City of Manchester, 16.1 percent of the population and 25 percent of all children are below the poverty line. “This represents a striking contrast with Nashua, where only 10.5 percent of the children are in poverty, or in suburban areas of Hillsborough County, where less than 5 percent of the children are in poverty.”<sup>5</sup> While there have long been disparities in poverty, the situation in Manchester appears to have worsened recently.

*The number of children in poverty in Manchester increased markedly between 1999 and 2010, while in Nashua, the number barely changed. In a state with the lowest child*

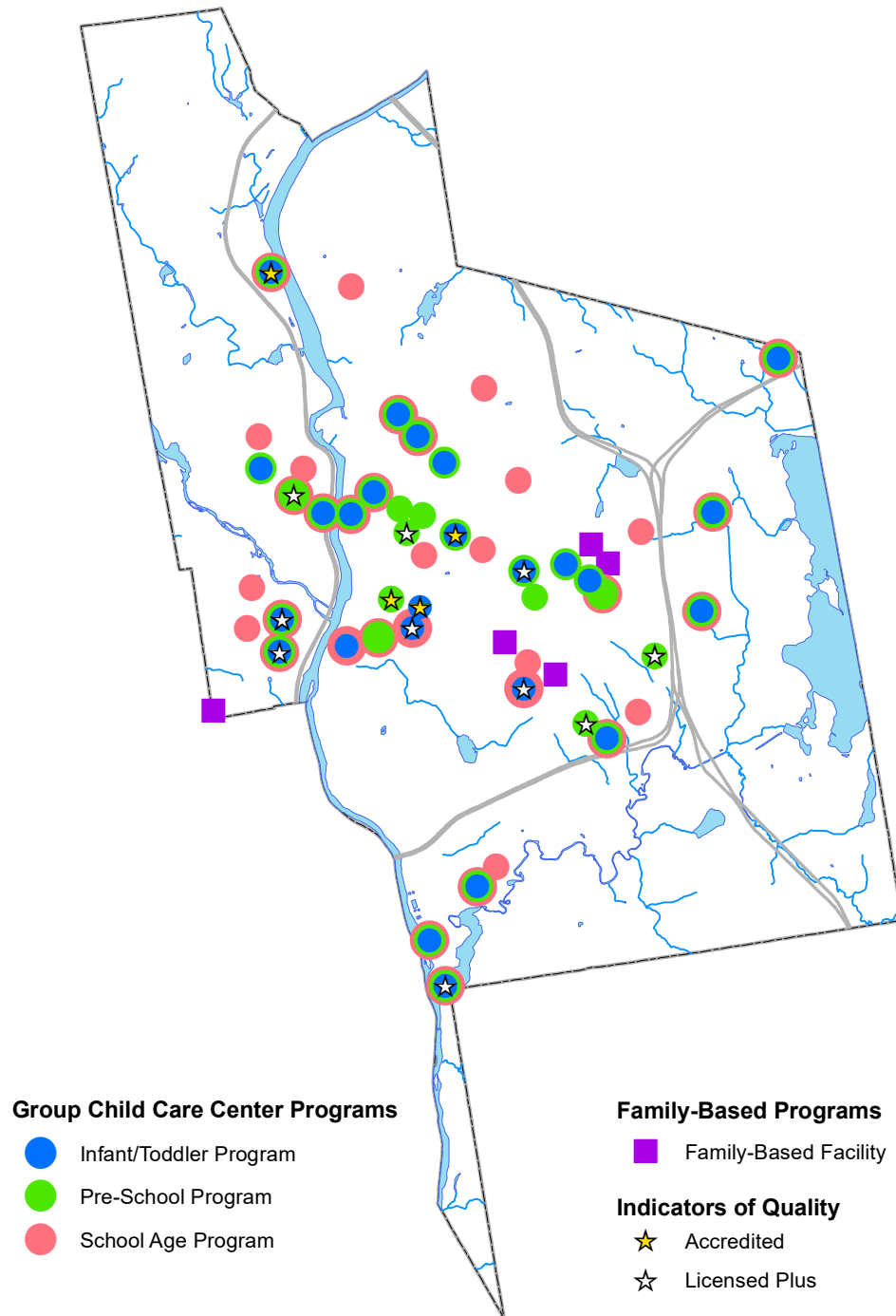
*poverty levels in the nation, it is puzzling that Manchester's rates are nearly as high as those in Boston (26.7 percent) and New York City (28.4 percent).<sup>5</sup>*

In Manchester nearly one-fifth of families are single-parent; 41.8 percent of families with children under 18 are single-parent families.<sup>3</sup>

### Child Care

Manchester has 56 licensed facilities, including 5 home based and 51 center based facilities, and a 2014 child care capacity of approximately 4,500 children.<sup>6</sup> There are 11 Licensed Plus programs and five Accredited programs. Please see the Licensed Child Care Facilities: Manchester map for program locations.

## Licensed Child Care Facilities City of Manchester, NH



### Manchester Market Rates

The Median Weekly Full-Time rate for Infants is higher than Sullivan County but lower than Coos County, while rates for older children are higher.

Age	6-52 weeks	13-24 mos.	25-35 mos.	36-59 mos.	60-71 mos.
Program Number	17	19	23	27	19
Percentage	100%	100%	95.83%	93.10%	95%
Minimum Rate	\$180.00	\$180.00	\$170.00	\$130.00	\$105.00
Maximum Rate	\$255.00	\$255.00	\$260.00	\$245.00	\$225.00
Average Rate	\$212.06	\$205.32	\$199.61	\$183.52	\$172.63
Median Rate	\$210.00	\$200.00	\$200.00	\$180.00	\$171.00
Std. Deviation	16.54	15.46	18.74	19.21	23.15
25 <sup>th</sup> Percentile	\$200.00	\$195.00	\$190.00	\$175.00	\$160.00
50 <sup>th</sup> Percentile	\$210.00	\$200.00	\$200.00	\$180.00	\$171.00
75 <sup>th</sup> Percentile	\$220.00	\$210.00	\$210.00	\$189.00	\$180.00
90 <sup>th</sup> Percentile	\$230.00	\$225.00	\$215.00	\$205.00	\$200.00

### Selected Issues

It is beyond the scope of this study to recommend significant changes to the support provided by the state of New Hampshire to child care programs, their staffs, and the children and families they serve. However, it would not be inappropriate to identify issues for further consideration, and we will do that for programs, facilities, staff, and scholarships. Some issues may pertain to the entire state and others to particular counties, or smaller geographic areas.

Programs:**Coos county –**

Numerous children in Coos county appear to be cared for in unlicensed facilities. Certainly licensed facilities are safest. However, in a desire to protect young children, consideration might be given to a few experiments, including:

- a. Initiate small steps that encourage unlicensed providers to become better trained, eventually leading to a greater number becoming licensed. A small amount of funding for training and support to unlicensed providers could be considered, with a transparent commitment not to punish those who take advantage of the opportunity.
- b. Create incentives to pair licensed providers with unlicensed providers to create a peer-to-peer network.
- c. Consider a more rigorous registration system for unlicensed providers as a step towards licensing.

**Sullivan county and Manchester –**

- a. Capacity should be expanded, particularly for infants and toddlers. One option would be to allocate or secure external funding for a 3-5 year phase in period, with decreasing subsidies, to help providers afford to initiate and initially maintain such programs.
- b. Technical assistance on policies and procedures for creating internal subsidies, so that older child slots are able to help subsidize those for the youngest children. This would allow for maintaining infant and/or toddler slots once external funding ends.

Facilities:**Coos County –**

Plans for a Balsams resort re-opening is likely to result in significant additional employment and bring new families to the area.<sup>16</sup> Should we start to plan soon for additional licensed programs for young children for parents likely to be employed directly or indirectly by this initiative?

**Sullivan County and Manchester –**

Assistance in helping providers obtain support for the expansion/renovation of facilities to be able to serve infants and toddlers could be considered.

Staffing:

1. Perhaps the greatest near term issue for New Hampshire is the increasing difficulty of finding and keeping qualified staff. As a result, fewer children may be served and classrooms left empty because providers may be unable to find qualified staff for some classrooms. This may be further complicated by staff movements from existing programs to new ones, reducing experienced staff in stable existing facilities and inexperienced management in newer facilities. We predict this will get worse, as unemployment is further reduced. Many smaller businesses are already feeling a contraction at the same time the economy is expanding.
2. A second and continuing need is training for infant and toddler providers and staff.
3. A third need would be targeted, specialized, small scale training. As examples:
  - A. While a strong system of online training and group training is underway, a pilot program could be conducted to build state training that develops provider peer expertise.

- B. As a result of staff turnover with experienced staff members, training providers to understand the costs incurred by a staff member's move to another facility places on the existing program, and ways to facilitate a smooth transition for the staff member, remaining staff, provider, and children and families should be considered.
- C. For experienced staff members, training to understand the potential difficulties that a move to a new facility can place on the existing program should be explored, and suggestions for how experienced staff members can facilitate their initial years at a new facility with potentially younger and less experienced managers would be helpful.
- D. For new center based providers, training for administrators to facilitate the startup period, and how to work join older, experienced staff with younger, perhaps better educated but less experienced staff to create a strong team.
- E. To prepare for future funding battles with those seeking support for the increasing number of seniors, there is a need for external funding to train and groom strong advocates ready to make the case for young children.
- F. Work to increase the participation in Seacoast Early Learning Alliance (SELA), and to use SELA as a model for shared services in other regions.

#### Scholarships:

If we assume that NH is likely to have limited funding for the next several years, then we might also assume it is possible that no matter what approach is used, some eligible children may not be able to receive scholarships. If that is the case, then open discussions regarding how to maximize scholarship monies to effect the greatest impact be initiated to help clarify the principles by which scholarships should be awarded, and determine whether any change to the current process might be beneficial. Possible approaches include any or a combination of the following:

1. *First come first served.* In this approach, any eligible family can apply for a scholarship, and if money is available then families are awarded scholarships until such funding is exhausted. This is current practice.
2. *Child age weighting.* Care for infants and toddlers costs more to provide than care for older children, primarily as a result of teacher-child ratio differences, and therefore the scholarship rate is higher. This is current practice.
3. *Poverty weighting.* Families at greatest need, as determined by homelessness or household income and number of children, might be given a somewhat higher likelihood of being awarded a scholarship. This may be a current practice.

4. *Geographical cost weighting.* In such an approach, children in areas of the state where programs are more expensive to operate might be provided a somewhat higher scholarship rate. However, as we have shown over more than a decade of market rate studies, this is a more complex issue than it appears at first blush. As just one example from the current market rate study, child care for one age range is priced higher on average in Coos County than in Sullivan County.
5. *Targeted geographic weighting.* Children in the greatest defined pockets of poverty in the state might be given a somewhat higher likelihood of being awarded a scholarship.
6. *Single mother weighting.* Nearly half of the single mothers with young children in our state are below the poverty line, and might be given a somewhat higher likelihood of being awarded a scholarship.

Any decision on weighting or increasing scholarships for one type of family or area has consequences; so does a decision not to make any changes. We believe the goal should be to reflect upon and clarify the most significant and transparent objectives in regard to scholarships and then determine how best to achieve them. We hope that the identification of possible issues will help direct such a discussion.

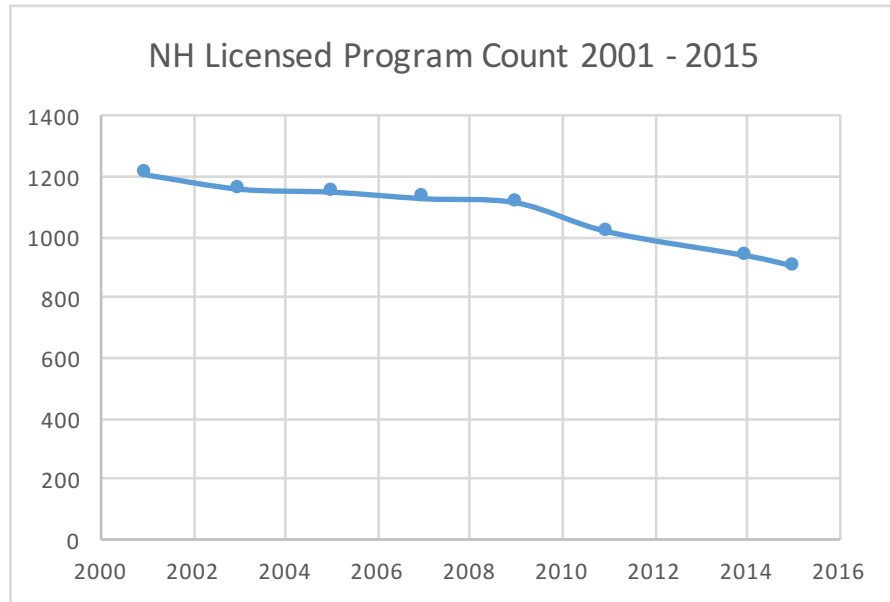
## Trends in NH Early Childhood Programs

How has child care in New Hampshire changed over the past nine market rate surveys (18 years)? Let's take a quick look at four categories.

### Number of Licensed Programs

There has been a gradual but steady decline in the number of licensed programs over the past decade. There are 25% fewer programs in December 2015 than in November 2001. In effect, the state has “lost” 305 programs during this period. Please refer to the table and its graph below for detailed information on the number of licensed programs over the past market rate survey years.

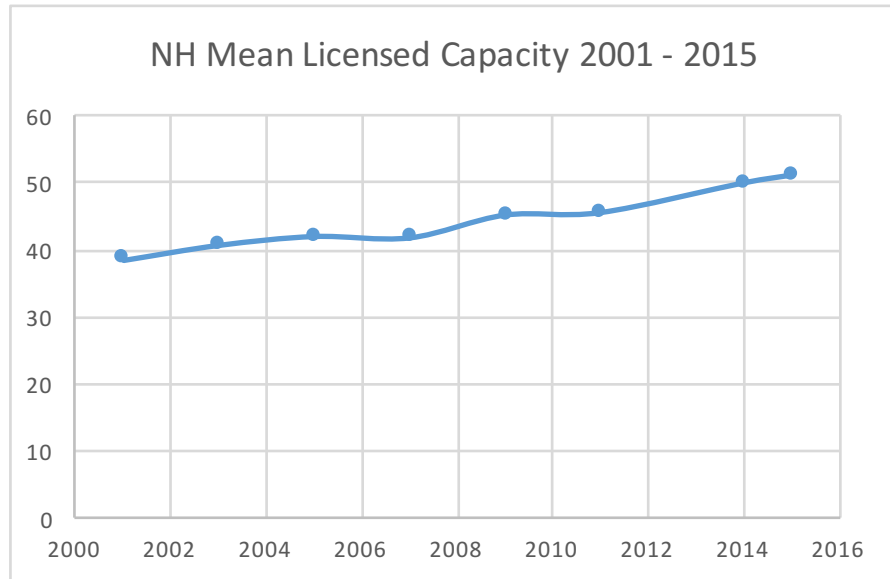
Year	Licensed Program Count
2001	1207
2003	1160
2005	1150
2007	1128
2009	1114
2011	1016
2014	936
2015	902



## Mean Licensed Capacity

Consistent with trends across the United States, mean licensed capacity has increased over the past decade, from 38.49 children in 2001 to 51 children in 2015. Please refer to the table and graph below for details. Thus, while the number of programs has fallen, overall licensed capacity has increased. It must be noted program size increases are not necessarily distributed in the same geographic areas as the closed programs.

Year	Mean Licensed Capacity
2001	38.49
2003	40.70
2005	42.00
2007	41.80
2009	45.14
2011	45.51
2014	49.86
2015	51.00



## Program Type Breakdown

- Center based programs have consistently been the largest group of licensed programs in New Hampshire, increasing from nearly one-third (32%) of licensed programs in 2001 to over half (51.08%) of total programs in 2015.
- Family home based programs have fallen from 21% in 2001 to 10.25% in 2015.
- The percentage of Family Group programs hit a high of 15% in 2001, then were significantly reduced and had regained some of their losses to 13.23% in 2011. Their percentage dipped to 10.71% in 2014 and didn't change much (10.07%) in 2015.
- The percentage of nursery school programs was 16% of the total in 2001, hovered at about 18% in the interim years, had fallen to 12.52% in 2011, and further to 9.52% in 2014. Their percentage bounced back to 11.15% in 2015.

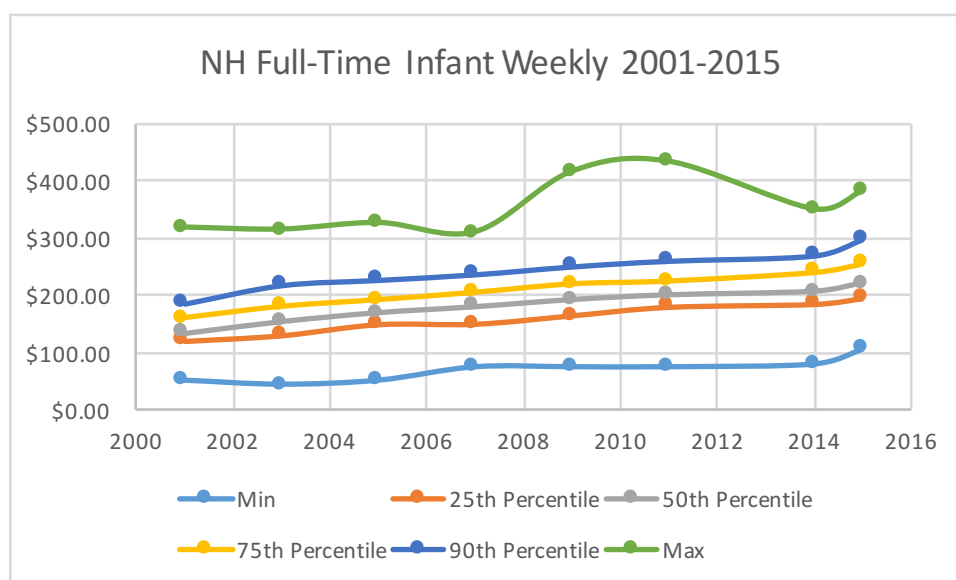
- Montessori programs have held consistent about two percent of the total over the years.
- Head Start programs have varied from 4-6%; they represented 5.46% of 2014 returns and 5.72% of 2015 returns.

## Rate Trends

### Infant Care (6 weeks to 12 months) Weekly

- NH infant care rates have risen consistently over the past 14 years.
- The median (50<sup>th</sup> percentile) for infant full time care has increased 63%, from \$135.00 in November 2001 to \$220.00 in 2015.
- The mean (average) for infant full time care has increased 61%, from \$140.77 in November 2001 to \$226.08 in December 2015.
- The full-time NH infant weekly rate comparison over the past surveys can be found in the table below, followed by its graph. Rates below include all program types.

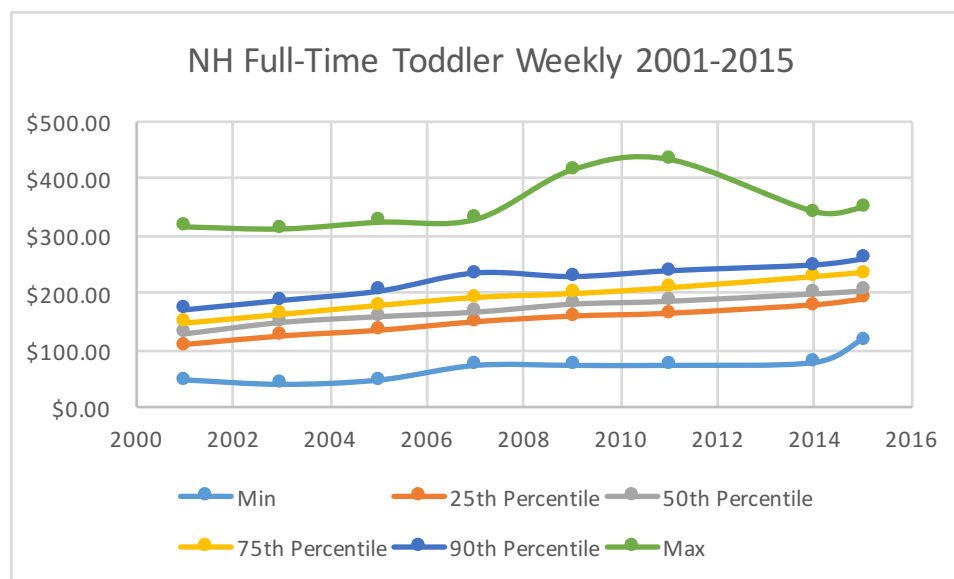
NH Full-time Infant Weekly	2001	2003	2005	2007	2009	2011	2014	2015
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$75.00	\$75.00	\$80.00	\$107.00
25 <sup>th</sup> Percentile	\$120.00	\$130.00	\$149.50	\$150.25	\$165.00	\$180.00	\$185.00	\$195.00
50 <sup>th</sup> Percentile	\$135.00	\$155.00	\$170.00	\$180.00	\$192.00	\$200.00	\$206.00	\$220.00
75 <sup>th</sup> Percentile	\$160.00	\$180.00	\$192.00	\$205.00	\$220.00	\$225.00	\$240.00	\$255.00
90 <sup>th</sup> Percentile	\$185.00	\$217.20	\$226.50	\$236.25	\$250.00	\$260.00	\$269.00	\$297.00
Max	\$317.00	\$313.60	\$325.00	\$309.00	\$414.50	\$432.00	\$349.00	\$380.00



### Toddler Care (13-24 months) Weekly

- NH toddler care rates have risen steadily over the past surveys.
- The median (50<sup>th</sup> percentile) of toddler full time care has increased \$75 (58%), from \$130.00 in November 2001 to \$205.00.
- The mean (average) for toddler full time care has increased \$81.73 (62%) from \$131.59 in November to \$213.32 in 2015.
- The full-time NH toddler weekly rate comparison over the past surveys can be found in the table below, followed by its graph.

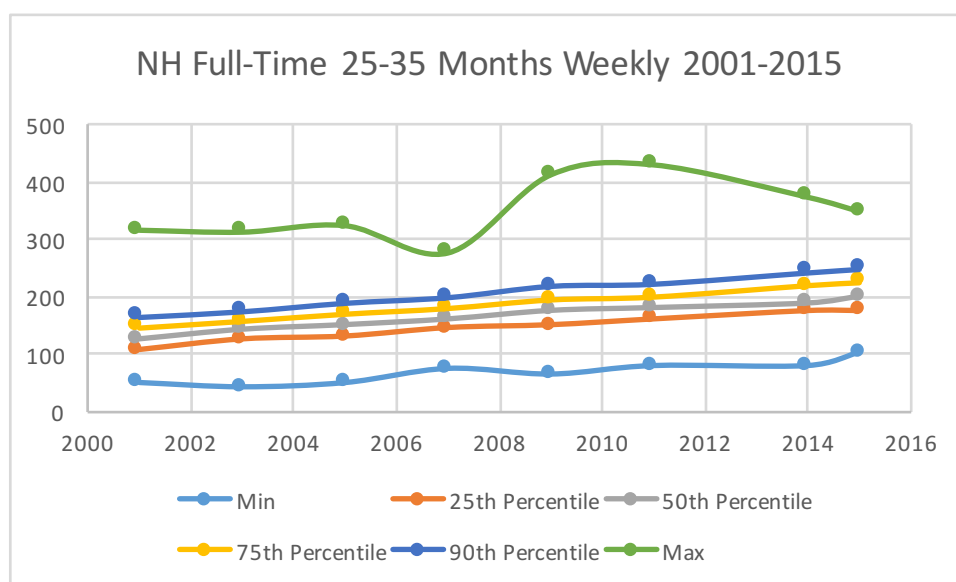
NH Full-Time Toddler Weekly	2001	2003	2005	2007	2009	2011	2014	2015
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$75.00	\$75.00	\$80.00	\$120.00
25 <sup>th</sup> Percentile	\$110.00	\$125.00	\$135.00	\$150.00	\$160.00	\$165.00	\$180.00	\$190.00
50 <sup>th</sup> Percentile	\$130.00	\$150.00	\$160.00	\$168.00	\$182.00	\$187.00	\$200.00	\$205.00
75 <sup>th</sup> Percentile	\$150.00	\$165.00	\$180.00	\$193.50	\$200.00	\$210.00	\$229.00	\$236.00
90 <sup>th</sup> Percentile	\$173.00	\$189.10	\$205.00	\$236.25	\$230.00	\$240.00	\$250.00	\$260.00
Max	\$317.00	\$313.60	\$325.00	\$330.00	\$414.50	\$432.00	\$343.00	\$350.00



### Young Preschool Age Care (25-35 months) Weekly

- NH young preschooler care rates have risen consistently.
- The median (50<sup>th</sup> percentile) for young preschooler full time care has increased \$75 (60%), from \$125.00 in November 2001 to \$200 in 2015.
- The mean (average) for young preschooler full time care has increased \$74.45 (58%) from \$128.30 in November 2001 to \$202.75 in 2015.
- The full-time NH young preschooler weekly rate comparison over the past surveys can be found in the table below, followed by its graph.

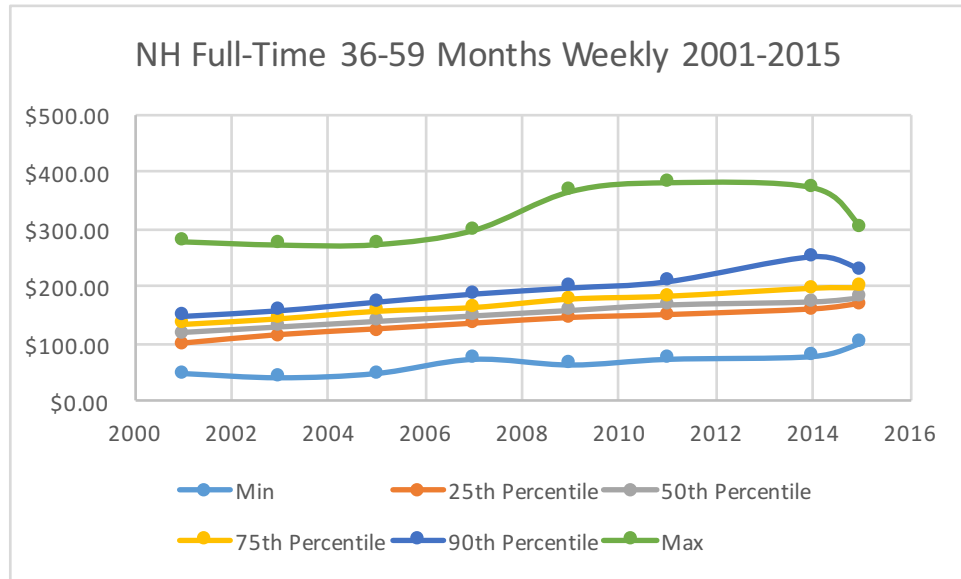
NH Full-Time 25-35 Months Weekly	2001	2003	2005	2007	2009	2011	2014	2015
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$65.00	\$80.00	\$80.00	\$103.62
25 <sup>th</sup> Percentile	\$106.25	\$125.00	\$130.00	\$145.00	\$150.00	\$160.25	\$175.00	\$175.00
50 <sup>th</sup> Percentile	\$125.00	\$141.88	\$150.00	\$160.00	\$175.00	\$180.00	\$188.00	\$200.00
75 <sup>th</sup> Percentile	\$145.75	\$157.50	\$170.00	\$180.00	\$195.00	\$200.00	\$220.00	\$225.00
90 <sup>th</sup> Percentile	\$165.00	\$175.00	\$190.00	\$200.00	\$220.00	\$223.80	\$243.80	\$250.00
Max	\$317.00	\$313.60	\$325.00	\$277.00	\$414.50	\$432.00	\$375.00	\$350.00



### Preschool Aged Care (36-59 months) Weekly

- NH preschool care rates have risen consistently.
- The median (50<sup>th</sup> percentile) for preschool full time care has increased \$63 (53%), from \$120 in November 2001 to \$183 in 2015.
- The mean (average) for preschool full time care has increased \$67.61 (56%) from \$120.51 in November to \$188.12 in 2015.
- The full-time NH preschool weekly rate comparison over the past surveys can be found in the table below, followed by its graph.

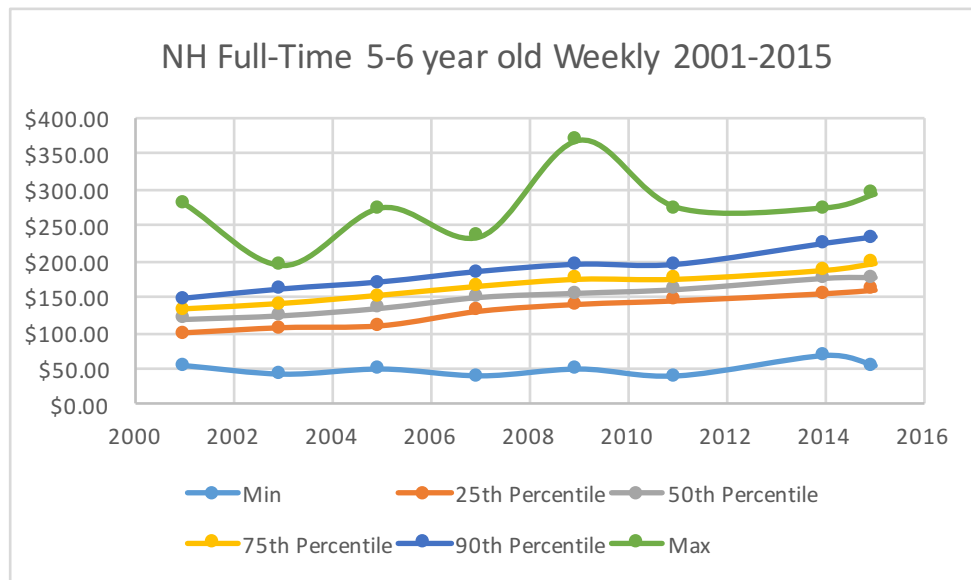
NH Full-Time 36-59 Months Weekly	2001	2003	2005	2007	2009	2011	2014	2015
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$65.00	\$75.00	\$80.00	\$103.62
25 <sup>th</sup> Percentile	\$100.00	\$115.00	\$125.00	\$135.00	\$145.00	\$150.00	\$160.00	\$170.00
50 <sup>th</sup> Percentile	\$120.00	\$130.00	\$140.00	\$150.00	\$160.00	\$170.00	\$175.50	\$183.00
75 <sup>th</sup> Percentile	\$135.00	\$145.00	\$158.25	\$165.00	\$180.00	\$185.00	\$199.25	\$200.00
90 <sup>th</sup> Percentile	\$150.00	\$160.00	\$175.00	\$189.20	\$200.00	\$211.00	\$255.00	\$232.00
Max	\$280.00	\$274.30	\$275.00	\$300.00	\$368.50	\$384.00	\$375.00	\$306.00



### Care for Children Between Five and Six Weekly

- NH five and six-year-old full time care rates have risen consistently over the past decade and half.
- The median (50<sup>th</sup> percentile) rate has increased 47%, from \$120 in November 2001 to \$176 in 2015.
- The mean (average) rate has increased 52%, from \$117.96 in November 2001 to \$179.03 in 2015.
- The full-time NH age 5-6 weekly rate comparison over the past surveys can be found in the table below, followed by its graph.

NH Full-Time 5-6 year old Weekly	2001	2003	2005	2007	2009	2011	2014	2015
Min	\$55.00	\$42.50	\$50.00	\$40.00	\$50.00	\$40.00	\$70.00	\$55.00
25 <sup>th</sup> Percentile	\$100.00	\$107.25	\$110.00	\$130.50	\$140.00	\$145.00	\$155.00	\$160.00
50 <sup>th</sup> Percentile	\$120.00	\$125.00	\$135.00	\$149.50	\$155.00	\$160.00	\$175.00	\$176.00
75 <sup>th</sup> Percentile	\$132.00	\$140.00	\$152.00	\$165.00	\$175.00	\$175.00	\$188.00	\$198.00
90 <sup>th</sup> Percentile	\$146.70	\$160.00	\$170.00	\$185.00	\$195.00	\$195.00	\$225.00	\$234.00
Max	\$280.00	\$195.00	\$275.00	\$235.00	\$368.50	\$275.00	\$275.00	\$294.00



### Population Changes

The NH population over 65 continues to increase, while the population under 6 is decreasing. The diversity of the child population is changing dramatically in the Concord-Nashua corridor, the Hanover-Lebanon region, and to a lesser extent the Seacoast. Both trends are likely to introduce further financial stressors on the child care and early education system.

### Poverty and Access

Pockets of high poverty continue to exist, especially along the Maine border and in the North Country, and poverty levels across the state are highest for children.

### Future Research

Five measures for better delineating the scope of problems regarding access to licensed child care are suggested:

- a. Compare the number of licensed child care slots to the number of children aged 0-5 in selected counties to obtain a crude measure of access. This could be further broken down by age categories (infants, toddlers, preschoolers).
- b. Compare Waiting List lengths when they exist, to licensed slots by age categories in selected counties to determine where there may be the greatest need for additional slots. This might potentially be further refined by a breakdown by town or zip code.
- c. Compare Unfilled Slots to licensed slots by age categories in selected counties to determine where there may be the greatest need for additional slots. This might potentially be further refined by a breakdown by town or zip code.
- d. In areas with higher than average poverty rates, estimate the number of children who may be cared for in unlicensed arrangements as a result of licensed program rates that are higher than such families can afford. In this same regard, consider whether “marketing” the availability of scholarships in these areas would be useful.
- e. Since infant care remains at least a partially unfilled need, prepare a postcard sized survey for NH hospitals to present parents in maternity wards asking their plans regarding child care. The aggregated results could provide excellent data for determining the location of greatest near term need.

## Conclusion

Child care and early education in New Hampshire is more complicated than one might imagine for a relatively small state. With nine completed market rate surveys, the full complexity of this picture is now emerging, and it has become easier to identify many key changes and trends over the past decade and half.

For general readers, the wealth of detail in this report can appear overwhelming, and this can make it appear slightly redundant if read in its entirety in one sitting. This is one reason most chapters were written so that each can be read and understood separately, and also why a separate Executive Summary has been prepared.

The authors are grateful to all the New Hampshire providers who took time from their busy and demanding schedules to respond to the survey, and have tried to secure small tokens of our appreciation in the form of incentives and prize drawings. Perhaps no one works harder on behalf of our state's families and your children.

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Comments and suggestions are most welcome and should be directed to [m.kalinowski@unh.edu](mailto:m.kalinowski@unh.edu).

## Footnotes

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